DOCUMENT RESUME

ED 426 274 CE 077 962

TITLE	Workplace Education Guide, 1999.
INSTITUTION	Massachusetts State Dept. of Education, Boston.; Pennsylvania State Dept. of Education, Harrisburg. Div. of Food and Nutrition.
SPONS AGENCY	Office of Vocational and Adult Education (ED), Washington, DC. National Workplace Literacy Program.
PUB DATE	1999-00-00
NOTE	89p.
PUB TYPE	Guides - Non-Classroom (055)
EDRS PRICE	MF01/PC04 Plus Postage.
DESCRIPTORS	Adult Basic Education; Community Colleges; *Curriculum Development; Employer Employee Relationship; Guides; *Literacy Education; *Needs Assessment; Program Evaluation; Student Evaluation; Two Year Colleges; *Workplace Literacy

ABSTRACT

These eight chapters share diverse experiences, lessons, and tips gleaned by the Massachusetts Workplace Literacy Consortium. "Workplace Needs Analysis (WNA)" (Harneen Chernow, Emily Singer, Jenny Lee Utech) focuses on the Worker Education Program's (WEP's) strategy, including tools, access, interviews and focus groups, presenting findings to the Planning and Evaluation Team (PET) and union, and process evaluation. "PETs" (Betsy Bedell, Joe Conolly, Jane Shea) addresses starting a PET, developing buy-in, setting the agenda, and issues and problems to address. "Labor/Management (L/M) Partnerships" (Harneen Chernow, Joe Connolly) describes how to integrate a site's L/M relationship into a WEP's everyday operations. "Workplace Education Classes and Curriculum Development" (Jenny Lee Utech) discusses curriculum developed from PET requests; uncovering workplace themes in the classroom; and workplace documents, safety, and workers' issues as lesson material. "Student Assessment" (Emily Singer, Jane Shea, Jim Ward) looks at WEP and Quinsigamond Community College assessment tools. "Program Evaluation" (Jenny Lee Utech) describes WEP evaluation tools. "Institutionalization of the Workplace Education Partnership" (Betsy Bedell, Joe Connolly) describes four experiences and the JVS and L/M WEP approaches. "Workplace Education Consortia" (Jane Brown) describes the Bristol Community College experience and provides program recommendations and guidelines. Appendixes contain the WNA Surveys for WEP and sample goals, objectives, and evaluation methods--Jewish Vocational Service. (YLB)

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ED 426 274

1999 Workplace Education Guide

Massachusetts Workplace Literacy Consortium

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1999 Workplace Education Guide

Massachusetts Workplace Literacy Consortium

workplace education guide coordinators:

Harneen Chernow
Director, SEIU Worker Education Program

Jenny Lee Utech
Teacher, SEIU Worker Education Program

Published by the Massachusetts Workplace Literacy Consortium
Olivia Steele, Adult and Community Learning Services
Massachusetts Department of Education
350 Main Street, Malden, MA 02148
Phone: 781 388-3300 x 358 Fax: 781 388-3394

Cover photos: Jewish Vocational Service (top); Worker Education Program (bottom).

Printed by Red Sun Press.

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introduction

From 1994-1997 the Massachusetts Department of Education brought together seven educational providers in partnership with 27 employers and 5 labor unions to form the **Massachusetts Workplace Literacy Consortium (MWLC).** Employers included large and small manufacturing companies, health care organizations and one higher education institution. These crucial industries represent significant portions of the Commonwealth's workforce.

Funded by the USDOE National Workplace Literacy Program grant, Wave 6, the MWLC provided basic skills instruction to assembly and production line workers, hospital and nursing home aides, housekeepers, dietary workers, and university maintenance and food service personnel. Partners worked together to provide a wide range of instructional services, including English for Speakers of Other Languages (ESOL) (the majority of classes), communication skills, problem-solving and math and computation.

The **Workplace Education Guide** is an attempt to share the wide range of experiences, lessons learned and tips gleaned while delivering thousands of hours of workplace

education. During the grant's three years, each educational provider developed their own model of program delivery while working in partnership with employers, unions (when present) and extremely diverse groups of workers. We are proud of the work achieved under the MWLC and believe that our capacity as a state to design and offer quality workplace education programs has never been stronger.

The Guide is a collaborative effort designed, written and edited by instructors and coordinators who work in the field and who were part of the MWLC. While the authors agree on the main factors needed to develop strong workplace programs, their approaches to resolving important issues are diverse. The Guide's chapters reflect this diversity; they contain the experiences and perspectives of their individual authors.

WEP

We know that no individual guide can address every question or predict every problem that may emerge during a workplace education program's setup and administration. We have, however, discussed major issues and challenges that most programs face and provided insight and guidance we wished we'd had prior to starting our programs. The Guide is not designed to be read in one sitting or from front to back. Read through the table of contents to find the topics that address your questions. Whether you are developing curriculum for the classroom or evaluating a program, these chapters will provide you with various approaches to guide your work.

If you have questions about starting a program or want to discuss any issues further, you can contact any of the Guide contributors or participating programs.

This publication was funded through a grant to the Massachusetts Department of Education from the United States Department of Education, National Workplace Literacy Program, Wave VI (#V 198A40054-97). This material does not necessarily reflect the views or policies of the Massachusetts Department of Education or the federal government.

contributors:

Betsy Bedell, Director of Adult Education, Jewish Vocational Service

Jane McLachlan Brown, Director, Workplace Education Program, Bristol Community College

Harneen Chernow, Director, SEIU Worker Education Program

Jenny Lee Utech, Teacher/Project Coordinator, SEIU Worker Education Program

Emily Singer, Teacher, SEIU Worker Education Program

Joseph Connolly, Ed.D., Program Coordinator, University of Massachusetts Labor/Management Workplace Education Program

Jane Shea, Program Manager, Adult Basic Skills Programs, Quinsigamond Community College

Jim Ward, Lead Teacher, Jewish Vocational Service/Massachusetts General Hospital Workplace Education Program

acknowledgements:

Commonwealth of Massachusetts, Department of Education, Adult Community Learning Services.

Bob Bickerton, DOE/ACLS.

Olivia Steele, DOE/ACLS.

Andy Nash, DOE/ACLS.

Workers at all the sites who were key to these partnerships.

Employers and union locals who worked together to make quality education available to their employees and union members.

Teachers from all the programs.

Steve Mazur, SEIU Local 285, for Guide layout and design.

participating programs:

The Workplace Education Program
Bristol Community College
64 Durfee Street
Fall River, MA 02720
Ph 508-678-2811x2368
Fax 508-675-4483

The Bristol Community College Workplace Education Program works with companies throughout southeastern Massachusetts to set up on-site basic skills training with customized, work-related curriculum which will best meet the needs of the worker and the company.

Jewish Vocational Service
Workplace Education Programs
26 West Street
Boston, MA 02111
Ph 617-542-1983
Fax 617-423-8711

Over the past twelve years, Jewish Vocational Service has successfully collaborated with employers in manufacturing, health care and service industries to implement customized workplace education programs for their employees. Planning and Evaluation Teams at each site have been central to these programs' success.

participating programs:

Adult Basic Skills Programs
Quinsigamond Community College
670 West Boylston Street
Worcester, MA 01606
e-mail: jshea@qcc.mass.edu
Ph 508-856-0395
Fax 508-854-4358

The Adult Basic Skills Program at Quinsigamond Community College is committed to providing opportunities to meet the diverse educational needs of adults within the community and the workplace.

Service Employees International Union/
Worker Education Program
21 Fellows Street
Boston, MA 02119
Ph 617-541-6847
Fax 617-541-6841

Since 1990 the SEIU Worker Education Program, a joint labor/management project, has partnered with workers and management to develop innovative strategies and programs for meeting the education and training needs of SEIU Local 285 members and unionized worksites.

participating programs:

The Labor/Management Workplace Education Program
506 Goodell
University of Massachusetts
Amherst, MA 01003
Ph 413-545-2021
Fax 413-545-5426

Serving workers, employers and labor unions across western Massachusetts, the University of Massachusetts Labor/ Management Workplace Education Program is an innovative employer/union educational partnership that is committed to employee participation and empowerment.

Commonwealth of Massachusetts, Department of Education
Olivia Steele
Department of Education
Adult and Community Learning Services
350 Main St.
Malden, MA 02148
Ph 781-388-3300x358
fax 781-388-3394

The Adult & Community Learning Services cluster at the Massachusetts Department of Education provides competitive funding opportunities for workplace education projects, and offers technical assistance and oversight to projects funded through their agency.

1. workplace needs analysis

by
Harneen Chernow,
Emily Singer and
Jenny Lee Utech,
WEP

From the first moment an educational provider sets foot in a workplace, she or he has entered an unknown environment – one with its own culture, set of expectations, workplace processes and decision-making, and its own formal and informal communication system. In order to design a program that fits the needs of the workers, employer and union, and make sure stakeholders are clear about the work site's basic skills issues, the educational provider must embark upon an investigatory process to learn about the workplace environment.

The Workplace Needs Analysis (WNA) is a systematic way of investigating these issues *before* any classes have begun. Learning about and identifying the skill needs of a workplace will give the educational partner, employer and union a greater understanding of the overall workforce's education and training needs. Prior to contacting an educational provider, the employer will probably have identified skills problems to be addressed through classes. Still, the WNA can unearth additional communication barriers and organizational challenges which if left "under cover" could negatively

impact a basic skills program's effectiveness.

Implementing a WNA allows the entire Planning and Evaluation Team *(see Chapter 2)* to gain a comprehensive picture of the workplace's educational needs *and* related organizational issues. Once completed, the WNA allows the PET to review the range of educational programs and organizational strategies that could help employees, employer and union address the identified needs. In addition, because the WNA draws out the basic skills component of workplace problems, it can help ensure that the PET sets realistic expectations for what the workplace education program can and can not accomplish.

Prior to contacting an educational provider, the employer will probably have identified skills problems to be addressed through classes. Still, the WNA can unearth additional communication barriers and organizational challenges which if left "under cover" could negatively impact a basic skills program's effectiveness.

At work sites where a PET has not been established yet, key representatives from the employer, union and provider can conduct the WNA. WNA interviews, surveys or focus groups may help identify potential PET members.

The Worker Education Program's Approach

Each educational provider has its own strategy and tools for designing, implementing and reporting the results of a WNA. In this chapter, we will focus on the Worker Education Program's strategy. WEP staff have developed WNA processes from other programs' experiences and adapted them to suit the particular industries (healthcare, service sector) that WEP serves. WEP's WNA is also tailored to function in the context of labor/management partnerships.

WEP's Steps for Conducting a WNA:

1. Participants form an initial Planning & Evaluation Team (PET).
2. PET establishes preliminary goals for the education program.
3. PET reviews the WNA process as a key tool to inform program design.
4. WEP staff implement the WNA process through interviews and focus groups.
5. WEP staff summarize and report WNA results to PET and union.
6. PET determines classes to be offered and

methods for addressing any other issues uncovered.

As part of the initial PET meeting, the WEP Coordinator presents the purpose and strategy for completing a WNA. In WEP's experience, employers generally support the concept of gathering data and assessing workplace needs prior to holding classes. While WEP staff will carry out the actual interviews and focus groups, the PET assists in the following ways by:

1. identifying key workplace issues and concerns that should be included in interviews and focus groups;
2. identifying key departments, supervisors, union leaders and workers that WEP staff should contact;
3. determining a method of introducing the WNA process and education program to the entire workforce (supervisors and workers);
4. assisting with logistics, e.g. release time for interviewees or reserving rooms for meetings;
5. introducing WEP staff to targeted supervisors, union leaders and workers;
6. agreeing on a realistic timeline for completing the WNA.

WEP

Tools: Interview Questionnaire

At WEP interview questionnaires are the principal tools utilized to conduct a Workplace Needs Analysis. WEP staff have developed three separate questionnaires for: 1) workers; 2) supervisors and managers; and 3) union staff and union leadership at the work site. *(See Appendix A.)* As a union-based education program, WEP uses separate interviews to assess more thoroughly: English and workplace skills workers need for their jobs; orientation and training needs; skills necessary for job development; barriers to job advancement; skills needed for active participation in the union and barriers to union participation. Information collected in the interviews goes into two final WNA reports, one for the PET and one for the union.

Tools: Flier

WEP staff often distribute fliers to help introduce the WNA process to the workforce. At one community health center, WEP staff created a flyer with a short description of the Worker Education Program, a brief outline of the WNA process, and WEP's phone number. WEP staff handed it out to workers and supervisors as a way to introduce themselves and explain their presence at the health center over subsequent weeks. At other work sites, similar information may go into the union's newsletter.

Access to the Workplace and Employees

To gain access to the workplace and workforce, WEP meets with management and union leadership (often at PET meetings) to identify potential WNA interviewees. WEP staff distribute written information, tour the work site and attend union meetings. At the community health center mentioned above, WEP took several steps to gain access to the workforce:

JVS

Labor-Management letter. WEP distributed a joint letter from the union and management to all employees to lay the groundwork for entry. The letter announced funding for classes and the upcoming WNA process.

PET meetings. PET members made a list of potential WNA participants (both supervisors and workers).

Tour of workplace. Human Resources representatives introduced WEP staff to supervisors willing to be interviewed.

Meeting with union representative. WEP staff met with the union rep to make a list of union stewards and other union leaders at the center to interview.

Union membership meeting. At on-site union meetings, WEP gave informal presentations, answered workers' questions and signed them up for interviews.

Referrals from key work site staff. Staff referred WEP to co-workers and other employees to interview.

Supervisor referrals. Key supervisors referred WEP to additional workers for interviews.

Conducting WNA Interviews and Focus Groups

. WEP usually conducts interviews one-on-one in a private space, assuring participants complete confidentiality. WEP often holds focus groups as well to allow workers to hear each other's concerns and ideas. At the community health center, the following steps were taken:

WEP usually conducts interviews one-on-one in a private space, assuring participants complete confidentiality. WEP often holds focus groups as well to allow workers to hear each other's concerns and ideas.

Interviews. WEP staff conducted interviews one-on-one or with small groups of employees from the same department. Staff and supervisors were always interviewed separately. Interviews were conducted in departments with release time granted by the supervisor, or over a break in a cafeteria. On a few occasions interviews were conducted by phone.

Focus groups. WEP used focus groups (group interviews) for large departments not able to provide release time for interviews. Focus groups typically met following department staff meetings. WEP staff adapted focus group questions from the interview questionnaire. WEP recommends using individual interviews instead of focus groups for departments where many students may be recruited. This will result in more detailed information for future program design.

NOTE. After WNA interviews have revealed work site demographics (diversity of cultural/language groups and departments needing high-level communication skills) WEP staff sometimes contact additional employees to get as accurate a cross section of the workplace as possible.

Summarizing and Presenting Findings to the PET

After teachers, program coordinator, workers, union representatives, supervisors and managers have finished interviews and focus groups, the educational provider must collate, summarize and present the WNA results to the PET. The Worker Education Program has developed a succinct report format that contains an overview of the WNA process, key findings, recommendations, support for the program, and any other important information.

Overview. The overview of the WNA process should include numbers of union representatives and stewards, workers and supervisors contacted and their departments. Briefly describe the WNA tools you used (interviews, surveys, focus groups) and with whom you used them.

Key skills. Include the key skills (for all jobs surveyed) that your educational program will address. A recent WEP WNA report for a health care clinic, for example, reported that interviewees consistently stressed the need for extensive reading, writing and English comprehension skills. Tasks cited as demanding these skills included: public speaking skills for staff and union meetings, reading and writing in patients' charts, recording items repaired in a maintenance log, phone skills and understanding and following spoken directions.

Problems like multiple shifts that would make scheduling difficult, lack of classroom space on site, supervisor resistance to providing release time for workers to attend class, or other barriers should all appear in your proposal so that the PET can address them.

Key findings. This section summarizes the work site's educational needs. Present the number of workers wanting ESOL and ABE classes. Also include other educational opportunities that you discovered workers want, even if your program cannot provide these. During WNA focus groups at a factory, for example, workers told WEP staff they were interested in classes on forklift operation. WEP incorporated this into its report to the PET as an example of work-related training needs that the employer could address.

Recommendations. Your proposal for an education program at the work site should cover the classes you plan to offer and which skills they will address. Also include proposed times the class could meet (based on your WNA findings). In this section you should also address any barriers the WNA uncovered to providing educational services at the work site. Problems like multiple shifts that would make scheduling difficult, lack of classroom space on site, supervisor resistance to providing release time for workers to attend class, or other barriers should all appear in your proposal so that the PET can address them. If the WNA uncovers substantial lack of interest or support for an educational program, the work site must know this.

Other important factors. If needed, list other key information uncovered during the WNA. Your report should clearly state any issues that fall under the scope of training and organizational development, which an adult basic education program cannot realistically address. This section might include larger communication issues between management and workers, increases in workload and employee stress, or lack of cooperation between departments.

Supports and resources. Include resources and support that the employer will provide for the proposed educa-

tion program, for example release time, classroom space, agreements from supervisors to support their workers' participation, and numbers of potential students.

Summarizing and Presenting Findings to the Union

As a labor/management program, WEP elicits and integrates union goals and issues into every aspect of its work site education programs. WNA interviews for union representatives and workers contain questions pertaining specifically to union concerns. Union representatives and stewards, for example, are asked to list skills necessary for union participation (public speaking skills, report writing, reading the contract) and put forward their goals for work site classes. Other interview questions ask workers and union leadership to reflect on barriers to union participation and suggestions for improving it. WEP compiles the results of these questions into a separate report for the union (in addition to the PET report).

Interview questions ask workers and union leadership to reflect on barriers to union participation and suggestions for improving it.

The report includes summaries of all responses to the WNA union section of rep and worker interviews and focus groups. Categories include: members' language and ethnic groups and skill levels; current level of union participation; workers' perceptions of their rights as union members; members' level of awareness of union activities and information; skills needed to participate in union activities; and barriers to participation and suggestions for increasing it.

Providing this report strengthens the union's support for the program by addressing it's goals specifically. As a "third party" outside the union structure, WEP often collects valuable feedback that members may hold back from union leadership, or information on members' language needs that the union may never have collected before.

Evaluating the WNA Process

The educational provider should lead the PET in evaluating the workplace needs analysis – its setup, tools and logistics. You can build this discussion around these questions: Which aspects of the WNA worked well? What aspects would you change next time? How much access did the educational staff have to workers, supervisors and union representatives? Which information gathered was most helpful? What other information would you solicit next time and what tools could you use to do this?

Tips for Conducting a Workplace Needs Analysis

- Get work site leaders (department heads, union) and PET members to help introduce the WNA to the workforce.
- If you don't have a PET yet, use the WNA to build it.
- Include as many "key players" as possible, including human resources, union leaders, supervisors and workers from as many departments as makes sense.
- Develop WNA interview and focus group questions that will uncover skills needs *and* organizational issues.
- Assure complete confidentiality for conducting interviews and reporting results.
- Use the WNA to get as complete a picture as you can and become familiar with the work site.
- Report WNA results and recommendations as accurately and honestly as possible.
- Use the report to identify issues that classes *can* and *can't* remedy.

WEP

2. planning & evaluation teams

by
Betsy Bedell, JVS
Joe Connolly,
L/MWEP
Jane Shea, QCC

In the workplace education context, a Planning and Evaluation Team (PET) is a group of stakeholders who meet regularly to participate in program planning, implementation, oversight and evaluation. Members include employer, union and provider representatives, students and occasionally funders. The PET is charged with the tasks of establishing program goals and ensuring that they are reached; assisting with program implementation and logistics; providing input into curriculum and program planning; developing an evaluation plan; reviewing and evaluating program progress; and pursuing the goal of institutionalization. *(See Chapter 7.)*

Ultimately, an active PET with strong representation from all stakeholders will ensure a cohesive, well-coordinated program; produce a greater sense of program ownership; and help to assure the delivery of high quality workplace education services. Beyond their involvement in program-specific activities, PET members may play an active role in advocating for workplace education not just with labor and management but also in the broader community.

1. How Do You Get a PET Started?

Experience has shown that a strong PET is the backbone of an effective program. The PET serves in an advisory capacity, but more importantly, it is the vehicle by which decisions are made and stakeholder input is incorporated into the program. Some providers introduce the PET concept to the employer at the first meeting to secure its establishment. Other providers spend time talking to different stakeholders within the workplace about the need for a PET to guide the program.

Focusing a strategic eye on PET membership is key to forming an effective group. Often times the human resources and labor union representatives, along with the educational provider, identify staff and departments that should be represented on the PET.

Focusing a strategic eye on PET membership is key to forming an effective group. Often times the human resources and labor union representatives, along with the educational provider, identify staff and departments that should be represented on the PET. This core group may meet once or twice to address program start-up issues and logistics before students are selected and added. Because each workplace has a unique culture, mission and long term goals, each PET develops its own character and operating procedures.

2. Developing Buy-In

The greater the support of PET members and the stronger their belief in the value of the education program, the better the program is likely to be. A strong PET also makes it more likely that the employer will institutionalize the program once public funding ends. The PET will be active and supportive if members have the authority to establish program goals, make curriculum decisions and monitor the structure and progress of the program. PET members need to have open communication with all program stakeholders to make sure that all aspects of the work site's culture are represented. Buy-in will follow naturally if PET members: sense that the employer and/or union is committed to building a lasting quality program; can see tangible program results; and believe that their involvement is needed to maintain a successful program. In fact, most members value the opportunity to make a difference.

During a PET meeting members may discuss a policy issue and then decide what action is appropriate. As a consequence, members set change in motion. This can be particularly rewarding for those who do not exert the same kind

of control on the job. Separate meetings and regular communication between the provider and the employer liaison, along with involvement of PET members in accomplishing concrete tasks, will help to foster and strengthen commitment to the program.

The JVS Experience

As the education provider, JVS is ultimately accountable to the PET. We see it as our responsibility to report progress regularly in meetings and to demonstrate our responsiveness to the group's wishes. We use the PET as an opportunity to check in with our partners and make sure we are on track. We use a problem-solving approach with the entire group when policies need to be revisited or issues resolved. This approach enables the employer and or/union representatives to share their perspectives with us as we work together to achieve mutually agreed-upon goals.

We also want to ensure that students' voices are heard. A JVS PET meeting often includes class reports given by students. Because they may have little experience participating in meetings or speaking up in group settings, or may feel intimidated by sitting at the same table with their supervisors, JVS program staff make a special effort to draw students out in discussions and make sure their points are fully understood. In some instances it has been helpful to help the employer and/or union understand the special issues non-native speakers may have com-

The Quinsigamond Experience

The following examples illustrate the importance of establishing a strong PET.

Example #1: The education provider spent two weeks in the workplace speaking with directors, supervisors, and workers and attending staff training and meetings to introduce the program to the entire workforce. Through these discussions she recruited interested people to serve on the PET. The team included stakeholders from all areas of the workplace who came together to set program goals and establish methods for evaluating the program.

During the three years of program operation individual PET members changed numerous times due to staff turnover. Because of the initial time spent recruiting and educating PET members however, these changes did not have an adverse effect on the program. The early stages of program implementation created an institutional understanding and ownership of the program goals and desired outcomes.

Example #2: At another site, the program coordinator met with the director of human resources and the director of training to introduce the program. PET membership was determined by the Director of Human Resources. In addition to herself, the PET included the Director of Training, two students, the Instructor and the Program Coordinator. No direct supervisors were invited onto the PET.

The PET did an excellent job establishing program goals and outcomes and designing a flexible learning model to address the changing workplace. The students experienced success and became strong advocates for the program and effectively recruited new students. However, since the supervisory staff did not have input into establishing program goals, they did not feel committed to the program. Some were reluctant to let workers attend class and this resulted in lower enrollment then the PET had hoped.

municating in English. For many students, participating on JVS PETs has provided a valuable opportunity leading to improved communication skills and also to employment upgrades, as supervisors and managers have recognized their contributions.

Finally, we respect the time limitations of our PET members. Meetings begin and end on time and we attempt to be realistic in requesting assistance outside of meetings.

A JVS PET meeting often includes class reports given by students. . . . Program staff make a special effort to draw students out in discussions and make sure their points are fully understood.

3. Who Sets the Agenda and How is the Agenda Set?

Typically the overall workplace education program agenda is initially set by an informal, mutual agreement among the key stakeholders. A grant award contract — with summaries of project goals, outcomes and evaluation methods — then follows and serves to formalize the prior oral agreement. Throughout the life of the grant award the PET acts as a vehicle for maintaining or modifying the program agenda as outlined in both the grant award and in prior understandings.

4. What Issues are Discussed and What Problems are Addressed?

Many times PETs opt to initially focus on the logistics of program start-up:

- identifying participants;
- ensuring equitable accessibility;
- determining who will be eligible to attend classes;
- deciding on schedules and space for classes;
- planning and scheduling orientations to the program;
- notifying supervisors and potential participants of the program;
- recruiting participants;
- deciding on release time and how it will be paid;

- addressing coverage issues for participating workers;
- providing input into curriculum planning.

The PET may have to determine which departments to include in the program or establish a rotational system that enables a larger number of workers or departments to participate. The PET must also set program policies and a method for enforcing them.

WEP

The support of supervisors and union stewards needs to be enlisted to ensure that workers are released for classes and receive encouragement for their efforts back on the floor. Supervisors and stewards may also be asked to help reinforce specific lessons that are being taught; those on the PET may have the responsibility of sharing class materials with their peers as a means of accomplishing this goal.

On an on-going basis, program development is an important focus. Is the program on track? Are goals being met? What adjustments may be needed to improve the program? Should new courses be developed? Should special projects be launched? What workplace themes should be addressed in the program's curriculum?

The Labor/Management Workplace Education Program's Experience

Since 1987, the L/MWEP Advisory Committee at Umass Amherst has debated and discussed a wide variety of workplace education related issues. For the L/MWEP these discussions have been key to forming a strong partnership and keeping all stakeholders abreast of program challenges and successes. Topics addressed in our meetings might include:

Program planning and implementation. Goal setting, timelines, outreach and recruitment and fundraising.

Teaching and curriculum development. Developing appropriate curriculum content or inviting retired university faculty to participate in classes.

Developing organizational connections. Connecting the education program's work to the university's Training & Development programs, the UMASS Chancellor's Action Plan or supervisory trainings.

Worker presentations. Presenting worker-produced videos or published collections of workers' writings.

Developing special projects. Shaping ideas for site visits or planning public reading or other worker projects.

Broad issues. Examining classism, racism and sexism as they play out in the work site, discussing issues of workplace changes and how they affect workers/students, or strategizing accommodations for learning disabilities.

Labor/management issues. Increasing involvement on both sides or hearing union members' concerns about the program.

Program evaluation is another key aspect of the PET's work *(see Chapter 6)* as well as program institutionalization *(see Chapter 7)*. Finally, throughout its tenure, it is vital that the PET determine the most effective means of continually communicating the achievements and the value of the program to all levels of the workplace.

Tips For A Successful PET

- Ensure that all stakeholders' voices are heard.
- Encourage participation of all PET members, particularly limited English speakers and other workers or students.
- Meet regularly.
- Involve PET members in meaningful tasks that address the stakeholders' priorities.
- Set up small task forces or subcommittees as necessary.
- Make the funders' expectations clear.
- Agree upon priority outcomes for the program.
- Periodically revisit program goals.
- Establish a realistic process for evaluating the program.

- Develop committee ground rules for maintaining effective meetings.
- Respect the labor/management relationship, as it may impact program decisions.

The Do's and Don'ts of Outreach and Recruitment

Start planning student outreach and recruitment early! Use your WNA interviews, focus groups and contacts to identify possible students, as well as supervisors, workers and union leaders who can help recruit people. Take time during initial PET meetings to discuss which recruiting strategies will work best for the work site and involve PET members in setting up outreach activities.

Do...

- spend time learning the lay-out of the worksite. The more comfortable you are getting around the easier student recruitment will be!
- use WNA interviewees as contacts during outreach and recruitment.
- utilize existing workplace meetings and communication systems (e.g. newsletters, all-staff meetings) to support program outreach.
- translate all written flyers and brochures into appropriate languages.
- distribute flyers widely; post on bulletin boards, distribute through union stewards and include in paychecks.
- encourage potential students to meet and talk with teacher(s) as often as possible.
- attend department meetings to discuss the program

BCC

with workers in small groups.

- attend union meetings to discuss the program and answer questions.
- set up information/sign-up tables in highly trafficked areas (break-room, cafeteria) during peak times.
- "hang-out" at time clocks and employee-only entrances to catch workers who may have been overlooked.

Don't...

- limit outreach to the use of written materials; potential students may be unable to read these materials and never know about the class.
- forget to bring sample classroom materials to every department meeting and information table.
- focus exclusively on one shift – make sure workers from all shifts learn about the program.
- assume workers who signed-up will attend class; make follow-up calls to all enrollees before the first day of class.
- do it all on your own. Other PET members should help pave the way by introducing you to department heads, workers and union leaders.
- exclude former students from helping with outreach.
- be shy!

3. labor/management partnerships

by
Harneen Chernow, WEP
Joe Connolly, L/MWEP

A successful education program in a unionized workplace requires a strong partnership between the employer, union and educational provider. The employer and union enter into the partnership familiar with their complex relationship. The educational provider, however, is often a newcomer and needs to learn about the labor/management relationship as part of their overall orientation to the workplace. Providers need to address this relationship in virtually all aspects of a workplace education program. The following section describes how a site's labor/management relationship can be integrated into the everyday operations of a workplace education program.

Program Areas

Each of these areas of the partnership must be discussed and agreed upon prior to the implementation of any classes.

PET (or oversight committee). Union, management, educator and students should all have permanent seats on the PET. Encouraging active participation from each PET

member will mean everyone feels ownership and works to make the program successful. Partnerships where the union or employer are inactive partners have weaker programs.

L/MWEP

Program goals. Whenever possible, management and the union should establish key goals for the program prior to hiring an educational provider. Management and the union usually share the goal of educating the workforce but have different underlying reasons for wanting it. Management's agenda often includes training a flexible workforce and improving communication between workers and clients, supervisors and co-workers. The union's agenda often includes improving members' ability to advocate for themselves at work and increased job security. Workers themselves also have their own goals. Given these differing agendas, the provider must initiate and build a process whereby labor and management can identify mutually acceptable program principles and approaches.

Sample Scenario

The management of a small manufacturing plant contracts with an educational provider to run an on-site ESOL program for their assembly workers. Even though the workers are unionized the employer feels it is best to keep the union away from the program "to keep things simple." After meeting with management and determining the goals and scope of the program, the educational provider begins their recruitment plan. They spend time meeting with workers in small groups, one-on-one and hanging out in the break room. Unfortunately only a few workers sign up. The educational provider continues to meet with managers and supervisors to problem solve the situation but cannot recruit more students.

Eventually management asks the union for input into the situation. The union states that workers are suspicious of the classes and view them as a way to weed out workers with minimal English skills. The union and company discuss this perception and the union is able to negotiate confidentiality for all workers enrolling in the program. The union also requests to be brought into the process as an equal member of the PET. Using their stewards network and word of mouth, the union talks with workers about the program, addresses workers' fears and recruits workers into the class.

Determining course offerings. Although funding may determine the types of courses to be offered, the union and management may want different courses. Management may want to offer a class focusing on workplace ESOL while the union may want English that addresses workers' whole lives.

Admitting students into the program. Management and the union need to agree on the enrollment, attendance and release time criteria for classes. Some programs use seniority to determine enrollment while

others prioritize specific departments. Whatever the criteria, workers should know them before enrolling.

Curriculum development. Deciding on class content and materials can be a source of major contention. An employer may want the class to focus on job-related issues connected to work performance; the union may want the class to focus on worker rights and health and safety. Supervisors and stewards are often called upon to share information and provide materials for classroom use.

Student assessment. The key issue here is determining who will have access to student assessment results. Educational staff are often called upon to report at PET meetings on workers' class "performance." Each PET must have its own confidentiality guidelines; the union and management should determine them together. To alleviate workers' fears that class performance might affect future job evaluations, staff can report *aggregate* results of *overall* progress.

Program evaluation. Both labor and management need to agree on the type of evaluation that will be implemented, including the scope, tools, stakeholder roles, and methods for disseminating results.

An employer may want the class to focus on job-related issues connected to work performance; the union may want the class to focus on worker rights and health and safety.

Conclusion

Even with the different priorities and tensions that occur within a labor/management partnership, these partnerships provide exciting and rewarding opportunities for educational providers.

"Starter" Tips for Educational Providers

1. Determine if the workers at the company are unionized.
2. If there is a union, find out the following information:
   - **a.** How did the education program evolve? Was it management's idea or the union's?
   - **b.** Who is paying for the program? Were the funds negotiated in the union contract?
   - **c.** How is the relationship between the union and the employer? Has there ever been a strike?

d. What is the name of the union(s)? Which workers at the company are unionized? How long have they been in the union?

3. Request that the union be part of the Planning and Evaluation Team (PET) (if it is not already).

4. Incorporate union *and* employer-related questions into the workplace needs analysis. *(See Appendix A for sample questions.)*

5. At PET meetings, propose the group make decisions prior to class start-up regarding the following areas:

   Identifying common ground

   Identifying program goals

   Formulating policies around work release time

   Reporting student/class progress while maintaining confidentiality

   Reporting attendance

   Developing curriculum

6. If the union or management representatives stop attending PET meetings, contact them directly and find out why they aren't coming.

7. Invite union or management representatives to attend class to meet students and address questions they may have.

"Sustaining" Tips for Educational Providers

Encourage union and management representatives to:

a. Use the education program to promote strategic initiatives within their respective organizations;

b. Develop a career ladder system to complement workplace education offerings;

c. Institutionalize funding for workplace education through collective bargaining initiatives.

This chapter includes excerpts from teacher reports written during the Massachusetts Workplace Literacy Consortium's first two years of operation. Teachers submitted these reports as part of the Consortium's effort to document curriculum development under the grant. This documentation was coordinated by the Curriculum Working Group, a group of teachers from each of the seven education providers.

4. workplace education classes and curriculum development

by Jenny Lee Utech, WEP

Teaching workplace ABE and ESOL classes presents instructors with unique opportunities. When developing student-centered or participatory curricula tailored to students' particular issues, workplace instructors have the advantage of working with a whole class full of workers with specific concerns in common. Instructors may also have access to actual workplace materials (union contract, postings about benefits, forms). Using these in the classroom can build concrete, work-related skills quickly.

Workplace classes also present special challenges. The teacher is only one of several PET stakeholders, each of whom may have very different ideas for class goals and curriculum content. In classes held during work time, attendance can fluctuate widely depending on students' workloads and supervisors' willingness to give workers release time. Since classes often get scheduled around shifts rather than students' abilities, teachers may find themselves juggling many different levels in one class. Finally, while instructors do have increased access to work-specific materials and issues, many

find it a real challenge to turn dry, complicated or sometimes controversial work-related topics into effective student-centered or participatory lessons.

Responding to PET Stakeholders

Teachers must often create work-related lessons from Planning and Evaluation Team (PET) requests or suggestions. PETs vary in their involvement from site to site. Sometimes they are a major source of work-related curriculum. Other PETs are supportive but largely "hands off" in curriculum development; still others work with the educational partners to develop a detailed competency curriculum. Occasionally, PET stakeholders may even disagree strongly on the educational program's goals and lesson content. Below are a few examples of curriculum developed from PET requests.

"I tried to make the language relevant first by imagining, then by getting from the students, workplace situations where they might have to use the language of polite communication. I found myself in a world where housekeepers felt themselves perceived as the lowest level of hospital society."

Document-reading

Managers and supervisors on the PET may want workers to be able to read and understand workplace documents. At a large hospital, the lead teacher/coordinator was asked to help her students read Material Safety Data Sheets, or MSDSs, so that students would be able to: identify and name the MSDS as the document which contains safety information about each chemical used by the housekeepers; know where the sheets are kept in case of emergency; and, where level-appropriate, be able to locate and identify important information on the MSDS. She designed a series of lessons to tackle these inaccessible documents:

> Working in groups of three, students brainstormed names and uses of chemicals they use at home . . . . We compiled a class list of these chemicals, talked about labels, the kind of information found on labels, and the difficulty of reading the small print of labels. For homework, I asked students to think about and if possible make a list of the chemicals they use at work.
>
> [In the next class], for a warm-up I asked the students to write in their journals about any accidents they had had at home. We then talked about these accidents. Again working in threes, students . . . compiled lists of chemicals they use and what each is used for. They also discussed questions re-

garding chemical use and the relevance and importance of MSDS.

In the following three classes, students compiled lists of chemicals they use at work and what each is for. The teacher also wrote a dialogue about MSDSs and HazCom manuals which students used for reading and role-playing in pairs. Students talked about what kind of information they thought would be on an MSDS. They tackled interpreting an actual MSDS for Clorox by reading an enlarged version and identifying the most relevant information. The final lessons focused on reviewing vocabulary and information gleaned from sample MSDSs, and then examining in pairs MSDSs students had brought in from their departments.

JVS

Workplace Communication

PET members often identify improved oral communication as a goal for work site ESOL and ABE classes. At one large hospital, the teacher took the PET's general request for work on communication and built a series of lessons around it:

> At the time the program began, the hospital had instituted Customer Service Training for all employees. The PET emphasized communication as the primary need for the employees, and accordingly I started a series of lessons based on the language of requesting, offering, and suggesting. This seemed to correspond nicely with a Customer Service training for Environmental Service workers in which I had participated. It also provided a "quick return" for both workers and supervisors, as the language was usable immediately in many cases. The program thus enjoyed a good take-off in student self-confidence and in the eyes of managers.

As the term progressed and the teacher and students got to know each other better, the prescriptive nature of the lessons changed direction as students began to express themselves on the issues underlying much of their communication at work:

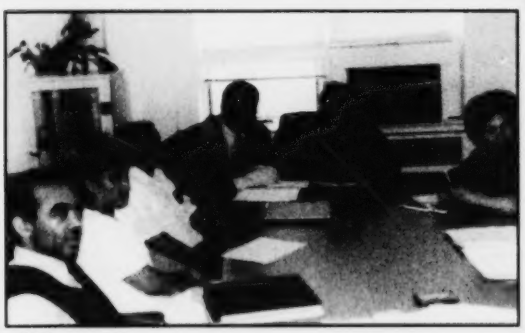
> I tried to make the language relevant first by imagining, then by getting from the students, work-

place situations where they might have to use the language of polite communication. I found myself in a world where housekeepers felt themselves perceived as the lowest level of hospital society. Our scripts and dialogues couldn't really contain this anger and frustration. In a protracted discussion the class came up with some hair-raising tales of conflict between housekeepers and professional staff, as well as visitors. Some of the class wrote stories about these events.

Obviously, the status problem is endemic with this kind of work, and real. From a language point of view, students could at least use the classroom to express their anger and write about it.

Union Goals

PET participants representing the union at a work site have their own specific goals for workplace classes. In one labor-management education program, for example, teachers regularly encourage discussion and critical thinking and develop lessons using labor and union themes. When the union representative on one of the program's PETs put forward the goal of workers understanding their union contract better, the ABE instructor developed a lesson sequence on "Understanding Your Union Contract."



WEP

She began with a dialogue from *ESL for Action* (Elsa Roberts Auerbach and Nina Wallerstein) that the class used to compare union and non-union workplaces. The class then generated a list of comparisons and reviewed union-specific vocabulary. After discussing how accessible the union contract was at the work site, students looked through the contract and chose sections they wanted to study.

After studying these sections, the class read and discussed "The Homestead Strike," a narrative of the historic 1892 steel mill strike in Pennsylvania (from *The Power In Our Hands* by William Bigelow and Norman Diamond). They used this text to generate a list of similarities and differences between skilled and unskilled workers, and then role-played each group. The unit culminated with a reading about

the Triangle Shirtwaist Factory (from *Live and Learn! A Labor History Curriculum for English as a Second Language and Basic Education* by Suzanne Oboler).

ISO9000

At a large manufacturing plant, the lead ESOL teacher described how she turned PET ISO9000 goals into creative, student-centered curricula:

> One of the PET's goals is for students to understand and be able to explain their jobs. This is especially important because of the increase in cross-training and regular visits from ISO9000 auditors . . . . After preparatory work in the [beginner] classroom, each student taught the others how to do her job . . . . It was a 'real' opportunity to use English. Everyone was willing to participate and all spoke with poise and confidence.
>
> In the intermediate class the majority of students wanted to improve their writing. I decided to use a photo story to achieve their goal [and the PET's]. Students wrote and illustrated their job steps and some shared their steps with the class. Each learner planned five photos of themselves at work to use in their books. I took, developed and copied the photos. Using their job steps as a basis, students further developed the writings and with their photos made a book "A Typical day at [Company]". Some students showed and talked about the book at graduation.

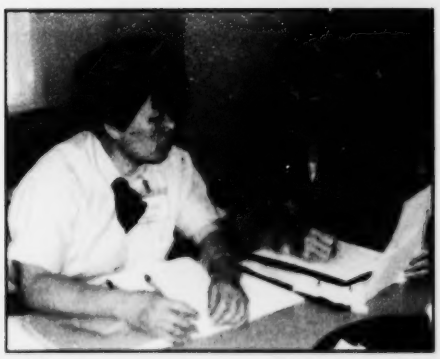
"I hope to educate my students rather than train them to perform certain tasks. These students know and perform their jobs well."

Challenges: Education Versus Training

Teachers incorporate work-related material into their language, reading and writing classes in many different ways. Some instructors, particularly those teaching beginners, teach specific work-related vocabulary and writing skills. Other teachers have students who need higher-level skills and a broader focus. In some cases, students take what they learn in class to their jobs right away. In others, students have fewer opportunities to apply what they are learning to their jobs. Even if they are teaching specific job-related lessons, however, teachers see themselves as educators, not trainers. One ESOL teacher commented,

> I don't think that the sole purpose of my job is to teach students how to do their jobs better by focusing extensively on their daily employment routines and I make a distinction between employment training and education. I hope to educate my students rather than train them to perform certain tasks. These students know and perform their jobs well.

Nevertheless, workplace educators may find themselves pushed toward a training role, either because of PET requests or simply because they are teaching work-related material. An ESOL teacher with a class of hospital housekeepers, for example, decided to create lessons on working with VRE (Vancomycin Resistant Enterococcus) and OXR (Oxacillin Resistant Staph), strains of extremely infectious bacteria. She developed this unit in response to one student's having been reprimanded for not following correct procedures. (The hospital requires special precautions — mask, gloves, gown and specific cleaning procedures — for everyone entering infected patients' rooms.) The teacher wrote, "The student speaks and understands very little English. She came to class later that day very upset and urgently asked for help understanding the precaution signs."



WEP

On her own, the instructor obtained information about VRE and OXR from the hospital's Office for Infectious Control. She created a short dialogue similar to what had happened: "I wrote it based on the worker's experience and it sparked instant and targeted discussion. The discussion led us to generate further questions about VRE and OXR, which we used as material for the next classes." Students also studied the precaution signs, learned related vocabulary, and clarified procedures (most workers in the class already knew them well). They wrote dialogues responding to the original situation and practiced them together. Reflecting on this work, the teacher wrote,

> Management on the PET was eager to have me cover the VRE/OXR procedures in class. They may have realized when the incident occurred that there were problems with the hospital's training. I discussed the situation with the nurse and the PET to

clarify that my role was not to train workers to follow procedures correctly so that no one is hurt. That is the hospital's responsibility. Rather, I was working to develop ways for students to discuss the issues surrounding VRE/OXR. Everyone seemed comfortable with this.

Challenges: Unrealistic Goals

Not all PET-generated curriculum ideas are appropriate or feasible. Management, union, and students may have widely differing or even conflicting goals for the education program. Instructors may find themselves in the middle, with stakeholders each pushing a different, and sometimes controversial, agenda. One ESOL teacher described how management on the PET expected instructors to stop workers from speaking their native language with each other during work:

> Since the hospital has expressed that its goals for the program include getting the workers to speak English to each other on the floors, it often feels as though there is little common ground between the goals of the management and the goals of the students. I do not feel that goals such as this are accomplishable or even valid for an ESOL class.

Another teacher reported that her student-centered approach sometimes conflicted with management's requests: "I always tried to look at the issue from the workers' point of view, rather than follow management's suggestion of using training videos or maps of the hospital. I feel that management often assumes that workers do not know anything and thus need to be educated about how to do their jobs properly."

Although workplace education teachers sometimes find it difficult to deal with such varied or conflicting PET goals, the PET can provide a forum to resolve tensions. Unrealistic or inappropriate goals, such as expecting learners to speak English to each other in preference to their native language, have to be dealt with frankly and quickly. A strong union and worker presence in the PET, as well as regular outreach to supervisors, can help assure balanced program goals that will not pull the teacher in too many directions.

Student Participation In Workplace Classes

Release Time

Although holding classes at the work site sometimes makes attending easier for workers, if can also create problems that affect participation. Some work sites choose to provide release time for workers to attend classes. This may mean that workers receive paid release time for part of the class; the rest is taken on their own time. At sites where many students come from one or two departments, letting several workers off the floor early on release time can become an issue. One ESOL instructor at a hospital undergoing a merger described the tensions that release time created:

> Workers are very cautious. Students are reluctant to take issues outside the class or speak up to supervisors about work problems. . . . The merger also has managers and supervisors anxious. Many are facing reduced staffing due to early retirement packages and upcoming layoffs, and may possibly be laid off themselves, so they are reluctant to give workers release time to attend classes.

Mergers and Downsizing

Mergers and downsizing, increasingly common in our economy, affect student recruitment, attendance and class morale in workplace education programs. Many times downsizing becomes part of the curriculum as teachers and students talk, read and write about it. In some cases, anxiety about job security motivates workers to take classes and enrollment goes up. At one hospital, the writing teacher commented,

> Since the merger . . . the [hospital] has been going through a process of restructuring departments, job descriptions and staffing. This has created heavier workloads, new reporting relationships and, for some people, feelings of insecurity. Employees feel a great sense of urgency to become more skilled as writers and learn to use computers effectively.

In other cases, downsizing may mean a teacher loses most of her students. At a factory undergoing layoffs, one

teacher reported:

> Because of layoffs, shift changes and company shutdowns, a sixteen-week session actually took approximately seven months to complete. Class size started at eleven people and dwindled down to only two. Attendance was erratic, which proved to hinder the academic progression of the class. I never really knew how many people were going to show up for class.

Sometimes classes respond to such crises by developing curricula around them. The hospital writing teacher above, for example, chose to focus on word processing skills and writing business letters and memos. This was both a PET and student goal, since such skills would be needed more and more for redesigned hospital jobs. At another hospital undergoing a merger, the ABE teacher developed a series of lessons designed to deal with workers' confusion, anger and fear of upcoming changes:

> We read Raymond Carver's poem, "Fear," which is a wonderful laundry list of things that frightened him. Everyone made her/his own list of fears (some of which were: losing your job, benefits, friends, daily structure, identity, dignity, self-esteem, your children's respect, society's respect, your sleep, your peace of mind, your trust in people, faith in the system, your writing class, your hopes and dreams, your future) and then everyone wrote A Poem of Fear. Doing this helped workers see themselves in new ways (as poets!) which helped them believe that they could indeed change and grow in a changing workplace.
>
> Fear of Change and loss of control led us to look at *Death of a Salesman* by Arthur Miller. We saw Willy Loman crushed by change and no one wanted this to happen to him or her. We did a great deal of reading and writing about Change. We read from *The Autobiography of Malcolm X* and saw positive change when Malcolm X taught himself to write by copying the dictionary. We read "Da-duh, In Memoriam" from *Tapestry* by Paul Marshall and studied how difficult, and sometimes impossible, it is to accept the new and unknown.

"The merger has managers and supervisors anxious. Many are facing reduced staffing due to early retirement packages and upcoming layoffs, and may possibly be laid off themselves, so they are reluctant to give workers release time to attend classes."

We looked at how people can effectively stand up for themselves and affect their own change. We read Maya Angelou's essay, "Complaining," from *Wouldn't Take Nothing for My Journey Now*, then reviewed and practiced writing inquiry letters and letters of complaint. We also studied the Guerrilla Girls to see how they get things done. We studied a piece about Rosa Parks' protest from "Rosa Parks: Profile" by Ruth Edmonds Hill, and discussed how the Unions helped change the working world.

Multi-level Classes

Multi-level classes are often the norm in workplace education. At many work sites workers are placed in classes according to their shift schedules instead of their level or needs. Multi-level groups also result because workplaces only offer one or two classes into which all interested students must go.

"It was obvious from the first moment that there was a wide range of abilities. The more ambitious students wasted no time in making their needs known. They had a clear agenda and didn't want to be held back by the less able students."

Such classes often create heavier preparation loads for the teacher. They can also create tensions among students, who come to class with pressing learning needs and want these needs met. The ABE instructor at a small hospital described the tensions in her class:

> It was obvious from the first moment that there was a wide range of abilities. The more ambitious students wasted no time in making their needs known. They had a clear agenda and didn't want to be held back by the less able students. One student . . . seemed outwardly impatient with the other students who were not as advanced as she. She would sit and sigh audibly when another student was struggling with a problem.

Teachers handle multi-level classes in many different ways. Often they combine small group work and individual work time to allow students to move at their own pace. They also involve the whole class in some projects, with learners participating in different ways. An ESOL instructor at a large factory describes how she handled a beginner class (twelve students) with a very wide level spread:

> Four of the Spanish speakers had the most education; two had high school diplomas and two had nine years of schooling. The four Cambodian women

had never been to school and were not literate in their own language. Two Spanish speakers had between one and five years of school and had literacy needs. The rest of the students had between six and eight years of education . . . .

I decided the class would work as a whole group for speaking and listening, and then in the last 30 - 40 minutes, would be divided into two groups for reading and writing . . . During the first part of the class, language activities were either multi-level or contained a minimal amount of print so that the non-literate students could participate fully.

"I decided the class would work as a whole group for speaking and listening, and then in the last 30 - 40 minutes, would be divided into two groups for reading and writing."

During the reading and writing section, non-literate students concentrated on learning to read. They worked on recognizing sight words, phonics, decoding skills, calendar and number literacy and reading simple stories. Because students were good at working with their hands and enjoyed manipulating materials, we often used a variety of unscrambling and matching activities with index cards. For the most part, students in the other group were stronger in reading than in listening and speaking. They worked on vocabulary building through reading, grammar exercises, paired interviewing activities and spelling.

Reflecting on this multi-level arrangement, the teacher wrote,

By working together on listening and speaking using picture-based activities, minimal print and multi-level activities, and then separating literate and non-literate students into two groups, different students could work on different language skills simultaneously. Picture-based and student-developed materials were successful and raised interest. I often drew pictures to communicate meanings.

But this class was a challenge to prepare and teach. It was a challenge to keep the print used in the class to a minimum and to think of activities to be done on two levels simultaneously. Preparation was time-consuming and juggling two reading groups

demanded a lot of my energy and organizational skills. In order to have one group work independently and effectively, I often made and used audio tapes or hands-on activities.

If instructors receive sufficient paid preparation time, they can often handle such multi-level groups effectively (even though preparing may still take more hours than the teacher is paid). Still, teachers and learners in these classes often report that students would make more progress in a class designed specifically for their level. Education providers should make other PET members aware of the challenges of such classes so that classes can be added, or preparation time increased if possible.

Workers who fear being "reported" for voicing workplace concerns or not learning work-related material "fast enough" will probably not participate actively in class. Even more likely, they probably won't attend at all.

Uncovering Workplace Themes in the Classroom

In addition to handling PET expectations, workplace instructors use many different activities and methodologies to discover which issues, workplace language needs and themes interest their students most. While teachers often use activities useful in any ABE or ESOL classroom, such as journals or Language Experience writing, certain methods work especially well with workplace classes. These activities provide "ways in" to students' concerns so that teachers and classes can build curricula around them.

Confidentiality

Workers sometimes assume that the teacher will report all classroom activity to their supervisors! Teachers *must* assure students that classroom discussions and student progress will remain confidential. The education provider should establish this early on with all PET members. Workers who fear being "reported" for voicing workplace concerns or not learning work-related material "fast enough" will probably not participate actively in class. Even more likely, they probably won't attend at all. Of course, teachers should report on themes, vocabulary and materials used in class without compromising workers' confidentiality.

Informal Discussions and Observations

Teachers report that students' most pressing work-related and other concerns often surface during informal dis-

cussions before the cycle starts and before, during or after class time. Teachers try to create the space for this to happen by establishing trust. Then they listen actively for themes that come up. An ESOL instructor at a manufacturing company reported:

> I develop my curriculum by paying close attention to my students' comments before, during and after class. By keeping an ear open to their casual conversations, I listen for spontaneously articulated discussions of work and non-work concerns; by listening to their conversations, I formulate in-class brainstorm sessions around students' work and outside-of-work concerns. These sessions also yield Language Experience Approach texts. I also begin each week with a general question about what is of concern to students that week about English, whether their concerns revolve around grammar, a particular reading, or a writing they have done the week before.

At a large hospital, students in the ESOL group started to talk before class about upcoming changes in benefits and job descriptions due to an impending merger. The teacher and students developed two curriculum units, one comparing the two merging hospitals and another looking at students' job descriptions and working conditions.

"I spent time sitting on line with each student, talking with them and taking notes. I asked each to explain her/his job to me and I tried to do it. . . . I wanted to begin a relationship with them on their own ground, where they were the experts."

Observing Students on the Job

Sometimes teachers get permission to speak with and observe students on the job. If an instructor can do this before the cycle starts, she can collect valuable material for work-related lessons. The lead instructor at a large manufacturing plant described how she used observation time:

> In the weeks immediately prior to the class, I tested and selected students. I spent time sitting on line with each student, talking with them and taking notes. I asked each to explain her/his job to me and I tried to do it. I observed what they were saying and doing. This gave me an idea of their language skills and needs and their work knowledge - and it helped me learn the [company] culture. To increase

learners' comfort level, I wanted to begin a relationship with them on their own ground, where they were the experts. I asked students what they wanted to learn in class and how they liked to learn. I collected personal stories from students in beginner classes in order to make class books.

Work-related Dialogues and Pictures

In addition to listening during informal discussions or observing workers, teachers often create structured catalyst activities designed to bring out important issues. Classes may look at and discuss photographs, draw pictures, or read and write dialogues. An ABE/ESOL teacher at a small rehabilitation hospital took a story that one student told at the beginning of class one day and turned it into a dialogue. It was a short conversation between a nurse's aide doing physical therapy (the student) and one of her elderly patients, who yells at her: "WHAT?**#@**! I can't understand anything you are saying. SPEAK ENGLISH! . . . You should go back where you came from. We don't want you here. I don't want you to touch me. Go away. Go away I said. GET OUT OF MY ROOM!"

Students may not talk about work problems when asked directly — this may feel too threatening. Reading about a similar situation, however, can depersonalize the problem and make it easier for people to open up.

The class acted out this little play and discussed it. "This was definitely a hot topic," the teacher wrote. "Every student had a similar horror story to tell. These stories were hard to listen to." After students shared their experiences and wrote about them, the class studied a magazine ad for insurance that pictured a neatly-dressed elderly couple sitting inside trashcans. This image, an advertiser's depiction of society's "throw-away" attitude toward its elderly, prompted students to discuss their feelings on growing old in the U.S. They also reflected on and wrote about the anger and frustration their patients might feel and how this might make them lash out at workers trying to help them.

Work-related Reading and Writing

Readings related to students' jobs also serve as catalysts. Students may not talk about work problems when asked directly — this may feel too threatening. Reading about a similar situation, however, can depersonalize the problem and make it easier for people to open up. One ESOL teacher took an excerpt from *Collaborations: English In Our Lives, Book 2* (by Gail Weinstein-Shr and Jann Huizenga) written

by a kitchen worker with work stresses similar to those of her students. She used the text to start off a unit on work stress. She had the class read and analyze the problems, raise questions to ask the Human Resource representative and write and perform dialogues.

Workplace Documents, Safety, and Workers' Issues as Lesson Material

Workplace Documents

Teachers often incorporate fliers, job announcements, handbooks, union contracts and other workplace documents into their lessons. An ESOL teacher described how he does this:

> I use postings placed on bulletin boards throughout the factory floor. Students pay close attention to these bulletin boards, as the postings often contain important announcements concerning benefits, holidays and issues related to the union. I photocopy any new announcements and use them as reading texts in class. Commonly, reading the text of an announcement leads to a guest — such as the union shop steward, director of personnel, or a department supervisor — coming into the classroom to answer specific questions, or else to students drafting a memo to managers asking for clarification and explanations of the issue.

During one cycle, this instructor developed an extensive curriculum unit around the workers' newly-negotiated union contract. He reported that, although learners found this material very important and engaging, using it in class caused tensions with supervisors:

> The plant underwent lengthy contract negotiations with the workers' union this year and, as a result, changes in the newly-ratified contract often came up in class discussions . . . . We took much time this year reading and trying to interpret the new contract — with both spectacular and disconcerting results. While students learned of specific responsibilities placed upon them by the contract (resulting in fewer disputes with Payroll about per-

sonal and vacation days, for example), and also learned the diction of legal language, members of management at the plant were concerned that the [education] program was advocating certain contract issues. When this view filtered down to line supervisors, an already tenuous relationship between line supervisors and the program was further eroded.

WEP

Perhaps in the future reading the union contract will become a declared, established part of the permanent curriculum, with the intention and reason for such a unit spelled out for all to see.

Many workplace documents do not lend themselves easily to classroom use. Examining the union contract's complex legal language, for example, took up much of the cycle in the class described above. It takes creativity and a lot of preparation time to turn such documents into useful instructional tools. A teacher at another factory described how she tried to use ISO9000 documents for a beginning ESOL class: "I found that even simplified, picture-based handouts I made for ISO9000 and the storm procedure were difficult for students and required a lot of translation."

Health and Safety

Workers in health care, manufacturing and other industries face an array of health and safety hazards in their jobs. They often welcome the opportunity to talk about these issues in class. In a factory ESOL class, the instructor wanted to give students a chance to share their experiences and explore safety in their workplace. She began with the story "My Accident Happened at the Factory" by Angel Tirado (from *New Writers' Voices: Speaking Out on Health).* After working through the text, the class shared stories about accidents they'd had at work. One student volunteered to have his story written up and the class read and analyzed it.

The class then used a picture story from *Picture Stories* (by Ligon and Tannenbaum) as another catalyst activity. The story dealt with safety and the power structure at work: a supervisor tells a worker to hook up a connection incorrectly and this causes a fire. The teacher reported,

Some students expressed their concerns about

discussing these types of issues in the classroom. We discussed it and agreed that what was said in the class would be kept confidential. Once students felt comfortable, they talked openly about the issues they face at work and how some people feel intimidated by their supervisors. We discussed the risks associated with speaking up (conflict with your supervisor or getting fired), as well as the risks associated with working in unsafe conditions (injuring yourself). Lastly, we worked as a group to write up one student's story about how he refused to work without a safety guard.

Developing Participatory Curricula from Workers' Issues

When students have problems on the job, they often bring them up in class. The classroom is a safe, neutral place; if a worker has just experienced something upsetting, it is natural to want to talk about it with classmates and the teacher. Workers from the same department may study together and either have the same problem or insights to share. Listening to these problems, facilitating discussion around them and sometimes incorporating them into the curriculum become an important part of participatory workplace classes.

"We discussed the risks associated with speaking up (conflict with your supervisor or getting fired), as well as the risks associated with working in unsafe conditions (injuring yourself)."

At a large hospital, a student who worked in housekeeping came to class very upset. A supervisor had told him to do some difficult scraping which was not part of his housekeeping job description. Other students shared similar experiences with this supervisor. The teacher, interested in participatory methods of discussing student experiences and problems, critically examining them and taking action to change them, encouraged students to look at the issue in class.

She grouped students by their jobs (five housekeepers and four Unit Support Attendants or USAs). She asked each group to make a drawing showing a problem at work. The housekeepers drew a scene picturing the job description problem; the USAs drew a scene depicting one of their typical problems. "I thought of drawing as a way to frame the problem and include subtlety and detail in a way that writing could not," the teacher wrote. "Drawing was a good activity for the mixed-level class, as it generated a lot of dia-

logue as the pictures were being drawn."

Both groups then wrote dialogues to describe what was happening in their pictures. During the next several classes, they practiced and performed the dialogues, wrote questions about them and brainstormed different ways to handle each situation. The teacher divided each group in half to write a second dialogue or scene showing an outcome. Students performed and then discussed these scenes. The teacher described:

> The discussion generated many stories about how students had already handled these situations with their supervisors. I typed up a summary of our discussion, including the stories students had told about negotiating with their supervisors. We discussed specific ways of asking to speak with a supervisor who is busy. . . . I asked students to write about how they would feel doing what their classmates described.

The unit ended with a class visit from the union representative, who answered questions the students had prepared ahead of time. This class was one of several in a labor/management program. In this case, the union's presence at the work site and in the PET gave the workers a chance to respond to workplace problems more effectively. Still, there were limits on how much workers could change the supervisor's behavior.

Ideally, participatory classroom work leads students to take action on problems posed in class. In reality, workplace instructors using the participatory approach may face serious barriers. Often workers are reluctant to take issues further than the classroom. They may hesitate to take action because they fear harassment from supervisors or co-workers if they speak up about problems.

Ideally, participatory classroom work leads students to take action on problems posed in class. In reality, workplace instructors using the participatory approach may face serious barriers. Often workers are reluctant to take issues further than the classroom. They may hesitate to take action because they fear harassment from supervisors or co-workers if they speak up about problems. Management may have no interest in supporting critical analysis of workplace problems!

An active union presence at the work site and on the PET may create a sufficiently safe space to discuss and act on workers' problems, as in the example above. Still, even the union may not be able to provide enough support to act on serious issues like chronic understaffing or site-wide restructuring. Even if class work does not change a difficult

situation, the class can still provide a safe space to articulate and share concerns.

Teachers whose reports were included in this chapter:

Jewish Vocational Service: Angela Atwell, Adam Bolonsky, Jill Faber, Joan Frutkoff, Jim Ward, Claire Winhold

SEIU Worker Education Program: Sharon Carey, Gretchen Lane, Elsa McCann Amadin, Emily Singer, Jenny Lee Utech

The Workplace Education Program, Bristol Community College: Wendy Lopriore

U. Mass Dartmouth: Leanne Ovalles

Tips for Developing Meaningful Work-related Curricula

- Get permission to observe students on the job before classes start; you will get to see what workers do and what is expected of them.
- Listen inside and outside the classroom before, during and after class for students' work concerns and build your curriculum around them.
- Use work-related stories and photographs to elicit students' work issues.
- Keep classroom discussions confidential!
- Involve PET members — union, managers and workers — in coming up with class content ideas and materials.
- Deal with unrealistic or inappropriate ideas quickly and honestly.
- Remember that you are there to *teach* workers lit-

eracy and language skills, not *train* them to do their jobs.

- Use the PET as a forum to resolve conflicting goals for classes — don't let yourself be pulled in too many directions.
- Advocate fór more than one class if you have a really wide level spread — multi-level classes have their limitations.

WEP

Workplace education programs conduct student assessment in order to:

- enable students to monitor their own learning;
- guide teachers' development of appropriate work-related and other materials;

5. student assessment

by
Emily Singer, WEP
Jane Shea, QCC
Jim Ward, JVS

- document students' progress for the program, PET and funder.

Student assessment tools are most effective when they are relevant to adult learners' culture and life experience, are non-threatening, and assess strengths (not only deficiencies). For this reason, programs often avoid standardized testing as an assessment tool.

Confidentiality

Confidentiality is of utmost importance. As the assessment process typically requires participants to reveal sensitive information (educational history or low literacy level), teachers must protect workers' privacy so that they trust the process. Fear of exposing their lack of schooling or skill

often keeps adults from participating in education programs. Potential students in a *workplace* program may be even more reluctant, since classes will be held on site and co-workers and supervisors will know who is attending.

Reports to the PET or funder should never include individual workers' names or assessment results. Management may expect individual "testing" or assessment reporting. The education provider must establish from the beginning that all assessment results will remain confidential. Explaining that confidentiality will create trust and allow workers to participate without fear of reprisals, will help all PET members support it. Presenting results in aggregate form will maintain confidentiality and still provide useful information on student progress.

Fear of exposing their lack of schooling or skill often keeps adults from participating in education programs. Potential students in a workplace program may be even more reluctant, since classes will be held on site and co-workers and supervisors will know who is attending.

Obviously, assessment results should *never* be used to influence evaluation of employees' job performance. Keeping assessment procedures and results confidential, and discussing this thoroughly with workers, supervisors and PET members, will help keep student and job performance evaluations *separate* and lessen students' fears of being penalized, demoted, or perhaps even fired if they don't progress "fast enough" in class.

Worker Education Program Assessment Tools

Pre and Post Assessment

Pre and Post Assessment tools are typically simplified lessons that enable a teacher to assess reading, writing, listening, and speaking skills and obtain information about learners' education history. The Worker Education Program's pre/post assessment package includes: a brief interview and an intake form, a variety of short work-related readings of different levels of difficulty (the student looks over all of them and chooses one), accompanying reading comprehension questions, and a writing sample. Students with few or no reading skills may choose a picture to discuss. Teachers conduct these assessments before or during the first week of class, and repeat the process (except for the intake) in the last few weeks of class.

Teachers using pre and post assessments of this kind should downplay any semblance to a test, be explicit that results are confidential and for teacher use only, and assist

those workers who need help filling out forms or writing (including transcribing for workers if necessary).

Benchmarks

WEP has also developed a series of benchmarks that help teachers mark students' progress in reading, writing, speaking, listening and general communication skills. Each of these five areas contains eight benchmarks describing specific skills to be mastered. Instructors evaluate students' level in each area at the beginning and end of the year. WEP has used these benchmarks at work sites wanting more "concrete" or number-based evaluation of student progress than pre/post tools, portfolios, or other alternative assessment tools provide.

Benchmarks can also be used to document progress statistically for formal reports. At one hospital, WEP reports changes in benchmark levels in aggregate form at the end of the academic year.

Portfolio Assessment

Portfolio Assessment is a collection of a student's work (writing samples, quizzes, readings, tapes), usually over a class cycle. What students and teachers choose to put in the portfolio varies depending upon the class focus. Some portfolios include *all* written work, and others include only selected or revised pieces. The purpose of portfolio assessment is generally two-fold: for students to assess their progress and learning needs, and for teachers to observe student progress and assess the effectiveness of their teaching methods.

Worker Education Program Portfolios

WEP teachers use portfolio assessment extensively with all levels of students. At regular intervals, WEP teachers ask students to review their work, choose specific lessons they learned from and articulate what they learned. Students collect this work in portfolio folders. One WEP instructor types up class discussions and encourages students to include these as a record of progress in speaking. Another WEP teacher developed a video portfolio assessment where she filmed interviews with students about their educational goals and progress. The class made tapes at the beginning and end of the cycle. These videotapes provided striking and tan-

One WEP instructor types up class discussions and encourages students to include these as a record of progress in speaking. Another WEP teacher developed a video portfolio assessment where she filmed interviews with students about their educational goals and progress.

gible evidence of participant's progress in verbal ability and increased confidence.

Quinsigamond Community College Assessment Tools

Quinsigamond Community College (QCC) weaves two main assessment and evaluation activities together to create opportunities for students to evaluate their own progress: **Goal Setting** and **Learner Portfolios.** As learners join a program, their individual goals are expressed, documented and revisited. This allows students to participate fully in the program's development and monitor their own progress, success and options for next steps.

Goal Setting

QCC instructors and students use the following goal-setting activities:

JVS

- Instructors discuss with students their optimal personal outcomes;
- Workers discuss expected outcomes of the program;
- Learners participate in a focus group to share their ideas of expected outcomes.

During goal-setting activities, learners voice and document their long and short-term goals, establish a time line for achieving them and create a process for examining progress. QCC instructors have found that the most valuable goal-setting activity is when the instructor and learner revisit the goals and adjust them as achievements are met.

Portfolios

In QCC's workplace education programs, learner portfolios contain a variety of assessment and evaluation tools, including: standardized or placement tests (if utilized at that work site), quizzes and writing samples. Other more learner-centered self-evaluative tools that QCC has used successfully in portfolios include learner logs and audio tapes.

Learner logs. A student in one QCC workplace class wanted to increase his use of English. He monitored the times he participated in conversations in English and kept a log of these. He then set goals to challenge himself to use his English skills more frequently.

Another student wanted to become more confident in using math in her everyday life. In her log she noted times during the day that she used her math skills. Documenting these activities confirmed for her that she didn't need to fear math. In fact, she was already using some math skills in her daily routine.

QCC instructors have found that the most valuable goal-setting activity is when the instructor and learner revisit the goals and adjust them as achievements are met.

Learning log styles vary from learner to learner and class to class. Learning logs can be as detailed as the student and teacher deem useful.

Audio tapes. One QCC ESOL instructor includes audio tapes in her students' portfolios. Students record reading, speaking, and conversation activities and use them continually to assess their progress in these areas. Validation of progress comes from the students themselves as they make and listen to the tapes.

Student anecdotal writings. Anecdotal or journal writing gives students an opportunity to look closely at what they've learned and the way they learn. It also allows students to keep records of their own and encourages communication between student and instructor. This reflective process often impacts class content, teaching methods and students' time lines (created at the start of the cycle). Often times in QCC classes, anecdotal writings are shared with the Planning and Evaluation Team (with the student's permission).

Instructor conferences. The results of student and instructor one-on-one interviews or conferences can become part of the learner's portfolio. Conferences allow the student to verify skills maintained or acquired and set in motion plans to assure future success. QCC staff have seen students expand their goals and future plans as they meet regularly with the instructor.

In workplace education programs, time available to build and maintain portfolios may be limited. It is important for students and instructors to select tools that will assist stu-

dents to evaluate their progress, and focus on strengths. QCC staff let workers decide whether their portfolio contents or outcomes are shared with other stakeholders. Sometimes sharing this information can effectively highlight program progress.

JVS End of Year Ceremony

Apart from its many educational benefits, a program's student writings often act as a springboard for presentations at the end-of-cycle ceremony and an effective "PR" tool to publicize the education program at the work site.

The following section describes and comments upon an end-of-year ceremony at a large Boston hospital workplace education program coordinated by Jewish Vocational Service. The quotations are from a description by the on-site coordinator/lead teacher. Reflecting on the ceremony, he noted:

> Our "Celebration of Achievement" at the end of the first year of our grant, was a landmark event for us. We had a good turnout, including the Vice President of Human Resources. He told me at the end of the celebration that it had been very good. When the time came for institutionalizing the program, he turned out to be one of our strongest supporters.

The program coordinator was obviously as impressed with the effectiveness of the event as the Vice President. Although he had spent considerable time planning, and intended it to be a showcase for the program, he was left with a feeling that the ceremony "was bigger than I expected."

Every program will obviously design its own ceremony to suit its students and work site. Standard elements, however, usually include:

- Short speeches by departmental managers;
- Student presentations;
- Awarding of "Achievement" certificates — perhaps by members of the PET;
- Refreshments.

Such an event becomes an assessment tool when it demonstrates student progress and the program's effectiveness. Elements should include:

- a picture or overview of the educational pro-

- demonstrations of student competence — a chance for employees to shine;
- a demonstration of the program's relevance to the workplace.

The Student Publication

Apart from its many educational benefits, a program's student writings often act as a springboard for presentations at the end-of-cycle ceremony and an effective "PR" tool to publicize the education program at the work site. A student publication timed to be distributed at the event wraps up the year in an impressive fashion. The program coordinator noted above observed:

> At our PET meetings, we spent a lot of time planning the Celebration. The guest list and invitations, attendance certificates, rooms and dates, were settled; one department undertook to see the student publication through the printer's, another took care of refreshments and class photographs; one manager on the PET set up displays using the photos and excerpts from the publication, which she placed in the room where we did the awards. One of the teachers stayed very late with the secretary working on the final draft for the book.

In this case, the "Celebration of Achievement" strengthened the relationship of the PET's management representatives. The PET's role was obviously essential and committed.

In this program, teachers were able to get access to training computers. They did some basic word-processing training for classes and kept student writing on disk. Some classes learned to edit their writing on computer, and after some final light editing by the teachers, a selection of writings was transferred to a single disk for publishing. The disks are a form of student writing portfolio.

Student Presentations

These are best kept simple. One instructor at the hospital noted:

> I wanted my lower-level class to do a set of role-plays as part of a (supposedly) funny skit on

giving visitors directions at the hospital. A couple of them got cold feet — I don't blame them — and didn't show up. So I had the others just read out relevant dialogues from the publication. That worked fine. One student made an unscheduled speech of thanks at the end of the presentations. I was so grateful to her.

The class clown told a funny story of how his supervisor had communicated with him when he started working there. By contrast with his present comfort in speaking English to a large audience, it was a great (if somewhat undeserved) compliment to the program.

The Celebration as a "Report On Curriculum"

To present a picture of the curriculum and its development, some sequence planning and linking commentary helps. In this example, the teacher told the audience how, from individual interviews with the students, a series of lessons was developed on Parent-Teacher conferences:

One student wrote a story about her daughter's troubles at school when she first came to America. She read this at the Celebration: "Almost every day when my daughter got home, she was crying." Some other members of the class used this story as the basis for parent-teacher discussion: *Teacher:* "Do you have any special questions for me?" *Parent:* "Yes, I'm concerned about my daughter's English." The affecting story and the well-constructed conversation, read out by their authors, seemed to me to make a strong impression on the audience. I thought it was a good picture of how we put together some of the curriculum.

Students might be nervous of performing but they usually pull through. This teacher remembered, "Before the ceremony, I couldn't persuade one of my students to read; afterwards, seeing how well everyone had done, she chided me for not including her."

Even if student presentations are not all directly work-related, Celebrations of Achievement can vividly show workers' progress, and the program's impact on the workplace

and on students' personal lives. As the teacher noted, "I was careful to have a balance of work-related and other material in the student presentations, just as in the classroom. I didn't go overboard trying to make everything work-related. But the managers were still impressed."

Reflecting on the Celebration and student publication, the program coordinator concluded, "It takes a tremendous amount of work — doing the student writing book, preparing the students, running around the departments — and I'm a bag of nerves by the time of the actual event. But everyone has a good time, the PR results are great, and I feel that everyone who comes gets a clear picture of the program and the good that it does."

Tips for Assessing Student Progress

- Use a variety of tools to measure student progress in different skill areas (portfolios of written work, audio and videotapes, student-teacher interviews, logs, benchmarks, student presentations).
- Include tools that allow students to measure their own progress.
- Keep all student assessment results completely confidential.
- As the education "expert", help other PET members understand the need for confidentiality.
- Report assessment results in aggregate form to maintain confidentiality.
- Use end-of-cycle ceremonies to showcase student progress and build support for the program.

6. program evaluation

by
Jenny Lee Utech,
WEP

The Massachusetts Department of Education and other funders require program evaluation as part of providing educational services. In addition to meeting funding requirements, however, evaluating a program's progress toward its goals yields valuable information. The PET and educational provider use the evaluation to assess the program's success and its impact on the workplace. The evaluation also identifies program strengths and weaknesses that the PET can build upon or change to improve the program. Ideally, program evaluation gives participants a broad picture that helps shape a sustainable program impacting students' work lives, home lives and workplace.

Worker Education Program Evaluation Tools

The Worker Education Program (WEP) has created a package of program evaluation tools to document workers', teachers', union representatives', supervisors', and other PET participants' assessment of program progress toward stated goals (articulated by the PET at the program's onset). Designed to be worker-centered, this evaluation process focuses

on learners' successes in the classroom and their experiences using new skills in their jobs and outside of work. Unlike traditional testing or scoring to document skills learned, WEP's evaluation uses interviews and class work to collect meaningful, substantive and direct feedback and reflections on program progress. The program evaluation gives weight and value to input from all stakeholders.

WEP's evaluation uses interviews and class work to collect meaningful, substantive and direct feedback and reflections on program progress. The program evaluation gives weight and value to input from all stakeholders.

The package includes learner, supervisor and union interviews, learner self-assessment and teacher assessment activities, student presentations at completion ceremonies and a PET self-assessment interview. All information collected is kept confidential and anonymous. WEP collates and summarizes the information gathered into a report for the PET that highlights successes and includes any recommendations for changes. WEP typically conducts program evaluations once a year.

Interviews

WEP staff have created separate interviews for students, union representatives and supervisors. Interview questions are designed to assess progress toward worker, union and management goals, as well as elicit ideas for strengthening the program and ensuring worker participation. Although format is similar from site to site, each workplace's interviews contain site-specific questions based on the PET's particular goals and workers' needs and expectations. A question eliciting evidence of progress in communication skills, for example, may focus on worker-patient communication or customer service skills, depending on the site. In the past, WEP's director has conducted these interviews.

Learner and Teacher Assessment Activities

WEP instructors use a variety of tools to help students assess their own progress, including portfolios, learner-teacher interviews, periodic written exercises and class discussions. Teachers also use a series of benchmarks designed by WEP staff to indicate progress in reading, writing, speaking and listening skills at the end of each cycle. *(See Chapter 5.)* In addition, instructors give monthly reports at PET meetings reviewing curriculum content, aggregate student progress, highlights of student successes and challenges the class may be facing.

Student Presentations

Completion ceremonies at the end of each cycle are a valuable program evaluation tool. During a typical WEP ceremony, students present essays, work-related dialogues or role-plays to highlight class accomplishments. At one hospital, for example, workers prepared a three-scene play depicting the ESOL class's impact on their daily work lives. At another site, students presented role plays they had been practicing for an upcoming inspection of the hospital. At other ceremonies, WEP students have read from *Working Writers*, an annual WEP publication of learners' writings. For PET members, co-workers, union representatives, supervisors and the students themselves, these presentations give tangible and moving evidence of progress and the class's impact on the work site and worker's lives.

WEP

PET Self-assessment Interview

WEP has designed a PET interview/survey to help participants evaluate PET functioning and program progress. Questions ask for suggestions on how to improve the PET and recruit additional personnel that might participate, as well as ideas for issues to raise in future meetings. Depending on the site, interviews are conducted by WEP's director or given to PET members in survey form to fill out and send back.

At one hospital workers prepared a three-scene play depicting the ESOL class's impact on their daily work lives.

Program Evaluation Reporting

WEP presents the results from all these program evaluation tools in a report to the PET. Typically between five and ten pages in length, the report includes: a brief history of program set-up; program structure (PET participants and activities, WNA results, outreach and recruitment activities conducted, enrollment numbers, PET goal-setting and curriculum development); and program evaluation results. This section lists all program evaluation tools and includes aggregate results from learner, supervisor, union and PET interviews. The report often ends with a brief list of program strengths (support from union and supervisors, successful recruitment) and areas to improve (release time problems, lack of participation from certain departments).

In the program evaluation section, sample responses for each interview question are reported to highlight interviewees' perception of worker and program successes. Interview highlights from one hospital's students included: "When I'm in patient rooms, they talk English with me. Sometimes I understand now." "The class helped me organize my thoughts and focus in, express myself and use the right choice of words." "The class is helpful in terms of my job. I can write notes pertaining to clients and make sure they are focused and to the point." "I go to department and union meetings and understand more than before. I am comfortable speaking up."

Supervisor responses included: "The students in our department were always good workers but they couldn't always understand what we were saying, and we couldn't communicate with them about what they were saying. This has gotten easier." "I have seen people move up within the dietary department. People want to move up and the classes help."

Challenges

Workplace managers and educators may have differing ideas of how to measure student and program progress. While teachers understand the importance of student-centered evaluation that measures qualitative change, managers may expect quantitative evaluation (testing) that produces easily-counted numbers. They may look for evaluation similar to what workers receive for on-the-job training (quiz scores or a list of competencies completed). When evaluating the program's impact on the work site, managers and supervisors may want statistics on improved worker productivity, reduced "worker errors" or other "hard" proof that the program is working. And they may want to see results fast.

Interview highlights from one hospital's students included: "The class is helpful in terms of my job. I can write notes pertaining to clients and make sure they are focused and to the point."

In addition, many workplace education programs offer only one or two classes on site, which by necessity contain a wide range of levels. Even though students make progress each cycle, they cannot move from one level class to the next. Management may initially see this as lack of progress.

The educational provider must work from day one to help employers understand the complex nature of adult education and program evaluation. Managers and supervisors need to see the educational process as long-term, producing multi-

faceted results that are sometimes hard to measure with numbers. Using a variety of evaluation tools that invite *all* stakeholders to assess program progress will help everyone see this. In addition, the educational provider can develop and use certain tools (benchmarks, for example) that "quantify" student progress to a certain extent and add a more concrete component to the report.

While teachers understand the importance of student-centered evaluation that measures qualitative change, managers may expect quantitative evaluation (testing) that produces easily-counted numbers.

Tips for Program Evaluation

- Begin discussing and developing evaluation tools early on!
- Develop tools that will capture feedback from as many participants as possible, including workers, union leaders, teachers, managers and front-line supervisors.
- As the education "expert", take responsibility for presenting tools to PET members and implementing them at the work site.
- Help PET members understand education as a long-term process that must be measured in a variety of ways that reflect qualitative change.
- Maintain complete confidentiality when reporting student progress.
- Include a "quantitative" component in the program evaluation report if necessary.
- Use the evaluation process to identify program strengths and areas for improvement.
- Keep your report succinct!
- Include anecdotal evidence of progress.

7. institutionalization of the workplace education partnership

by
Betsy Bedell, JVS
Joe Connolly, L/MWEP

Many workplace education programs are initially funded with grants from public agencies. In Massachusetts these grants are time-limited and the employer and/or union gradually assume the costs of running the program. During each year of the grant, employers/unions are responsible for funding an increased percentage of the program's expenses until public funding ends. This process is called institutionalization.

Achieving institutionalization can be complicated and involve issues out of the educational provider's control. Still, there are steps the provider can take to increase the chance that an employer will choose to fund the program.

A Strong Foundation

Setting a strong foundation for institutionalization from the beginning can not be over-emphasized. Some points to consider are:

Start early. Introduce the concept of institutionalization during the initial program planning or grant

writing period.

Include the goal in all operations. Solidify the partners' commitment to work toward institutionalization by signing a "Memorandum of Agreement" that includes institutionalization as a goal. When preparing an initial program budget, build in a progressive cash match from the employer to formalize the transition from public to private funding.

Initiate practices that promote institutionalization. Introduce the topic during initial PET meetings and include it as a regular agenda item. Develop clear institutionalization timelines. Document and promote program progress and successes. Develop allies inside and outside the PET who will help advocate for the program. Thank people for their assistance every step of the way.

The funders' goal is to develop labor and management's capacity to assume the workplace education program costs once public funding ends.

Involve key people. Identify the workplace's decision-makers and determine the best way to approach them. Reach out to multiple levels of employer and union leadership to cover all bases. Utilize PET members in all presentations on institutionalization.

Building the Case

Programs with public funding usually understand from the outset that: 1) these funds are limited; and 2) that the funders' goal is to develop labor and management's capacity to assume the workplace education program costs once public funding ends. It generally falls to the education provider to communicate this goal to other program partners and push to accomplish it.

When establishing a new program, everyone naturally focuses on start-up and implementation issues. If the provider-employer-union relationship is new, there are likely to be many questions: How do we get started? Will supervisors support the program? How can we recruit enough participants to fill classes? Will this program be too costly? If the employer is concerned about their costs for a largely publicly-funded program, paying for the entire program two or three years down the road may seem prohibitive. Meanwhile, the education provider wants first of all to "get the contract" and may be reluctant to push too many agendas at once.

Yet institutionalization must be addressed early and often in order to ensure success. If, as part of the program proposal, the funder requires a signed Memorandum of Agreement with an institutionalization clause, this may provide a good opportunity to broach the subject formally with the business partner. If a progressive cash match is required from the employer, these expectations must also be spelled out during the proposal phase. The next opportunity comes during initial PET meetings in which program goals are addressed and defined with a broader group. Institutionalization then needs to be included regularly on the PET agenda so stakeholders can begin to see connections between goal setting, evaluation, and preparing for the program's future.

Institutionalization needs to be included regularly on the PET agenda so stakeholders can begin to see connections between goal setting, evaluation, and preparing for the program's future.

Depending on the length of the funding period, partners may feel more or less urgency to address institutionalization issues. Because the process can become quite involved, it is wise to allow a minimum of *a year's time* to fully accomplish the goal and make timelines clear.

Program outcomes are key in preparing a strong case for program continuation. Although the program's direct impact on workers' jobs or departments can be difficult to measure, these work-related results are what employers most want to see. Careful documentation and analysis of results can be used to show management and labor leaders the short- *and* long-term benefits of providing workplace education. Presentations and proposals based on this information become a key part of the institutionalization process. *(See Chapter 6).*

Careful documentation and analysis of results can be used to show management and labor leaders the short- and long-term benefits of providing workplace education.

In addition to program outcomes, other factors which may contribute to an employer's decision to institutionalize include: return on investment in the current program; costs of the proposed program; the history with the provider; the current program's perceived quality; program marketing; and the other external factors such as the resources available, the current labor market, and competition from other education providers.

Institutionalization Experiences

Institutionalization can take a variety of forms. Some are clearly more desirable than others. Ideally, the employer will decide to continue working with the same provider, build-

ing on mutual experience and an existing relationship to further develop the program. However, the employer might just as easily decide to change providers, hire an individual teacher from outside just to teach the classes, or hire the program teacher away from the provider to run the program. The employer may also decide not to continue the program at all. Every one of these scenarios can happen, and has, in workplace education programs around the state. Following are four experiences from several Massachusetts programs.

Situation 1

The employer and provider had worked together for ten years to provide on-site ESOL classes to entry level assemblers. The program had evolved into a stable design incorporating an active PET, and institutionalization planning was underway. All indications were that the program was set to continue (active management participation on the PET, 100% paid release time and regular evaluation of program goals) when the employer revealed that they were looking into another provider! With the funder's help, the current provider got copies of the competitor's marketing materials, in which they claimed to produce rapid results, moving readers up several grade levels with only a few hours' class work. The provider learned that this organization was marketing widely across the state to numerous programs whose federal funding was about to expire. The provider analyzed their data and found DOE documentation that helped counter the competitor's claims. This information was then carefully woven into the institutionalization proposal.

Result: After several uncertain months, the employer decided to continue the program with the current provider.

Analysis: This situation was totally unanticipated, putting the provider on the defensive and forcing them to be even more thorough in their presentation to the employer. There was at least a 50/50 chance that the employer would choose the other provider. It took a lot of behind the scenes research to determine what was going on, and strategizing to determine the best way to handle the situation. The funder's support was extremely helpful.

Postscript: One year into institutionalization the employer requested a cost proposal from the provider, implying that the program would continue for another year. The provider

appears to be back on solid ground, but the previous year's experience warns against complacency.

Situation 2

Another long-standing relationship, this time a consortium with two employers and one education provider: one employer in particular had demonstrated consistently strong leadership and exceptional support throughout the life of the program. Both employer and provider had invested huge amounts of time and effort. As a result, the PET was effective and committed, and the program had become a flagship model. One employer was undergoing a major reorganization as the result of a merger; the other employer had experienced a change in management within the previous year. Both were facing budgetary cutbacks. For more than a year, the PET had focused on institutionalization planning. The provider prepared graphs and charts reflecting learners' progress at different levels and the time it took to get there, gathered information on various models of institutionalization, and made presentations to the PET. The group also considered different scheduling and release time options, the ramifications of scaling back the program, and the possibility of adding other employers into the program.

WEP

Result: Shortly before the end of the grant period, the lead employer called the provider to say the decision had been made to take the program "in-house" by hiring the program's lead teacher to run it.

Analysis: There appears to have been no recourse to this situation. This final option was not discussed with the PET and from the outside, it was impossible to see it coming. The teacher had never expected to leave her job with the education provider, but the offer she received would have been difficult to refuse. From the funder's perspective, the decision still represented successful institutionalization, but from the provider's perspective, it represented a significant loss of time, energy, personnel and expenses.

Postscript: The teacher remains in her new position a year later, working harder than ever. Given her competence, there is little doubt that the program will continue to succeed. Now she is directly responsible for the program, however, and must direct it without the provider's support.

Situation 3

A large employer and education provider had been working together for about three years. The PET was supportive of the new program and benefited from the presence of a very well-liked and influential department head. The provider began to address institutionalization planning with the group several months before public funding was to end. The team looked to the provider for advice. Working together, they decided upon services to propose for the following year. The provider prepared a proposal and budget, and presented it to the PET for review and revision. The HR representative scheduled a formal presentation with decision-makers. One issue to consider was how to budget for program costs.

JVS

Result: One to two months later, the decision was made to institutionalize. A portion of tuition reimbursement funds, for which program participants would not be eligible, would be diverted to help cover on-site program costs.

Analysis: Key PET members helped push the institutionalization agenda behind the scenes. During the proposal presentation, their role became obvious. Having prepared the proposal and budget, the provider's work was done. PET representatives' eloquent and convincing arguments on behalf of the program determined the final decision.

Postscript: The program has continued to run effectively with private funding. Efforts are now under way to prepare a budget for the coming year.

Situation 4

A provider had been working with a large employer and a large union local for eleven years in a labor/management partnership. Initial funding came from the State and the union. The provider was not an outside agency; it had offices located on the employer's grounds. Provider staff always emphasized participatory methods and teachers, participants, employer and union were all very active in the program. Initially, the program offered only basic literacy and ESOL classes. Within two years, however, classes included communication, problem solving, diversity and leadership

skills. These courses generated high levels of enthusiasm and involvement that led workers to play a key role in pushing for institutionalization.

Result: Over the years the employer and union inched their way towards institutionalization. Eventually the employer began increasing cash support on an annual basis. After ten years of operation the employer and union negotiated contract language that institutionalized funding for the program.

Analysis: The provider developed an institutionalization strategy that motivated stakeholders to advocate for ongoing funding. The Advisory Board (PET) also played a pivotal role, as did participants' and supervisors' favorable feedback . Still, the process took ten years.

Postscript: The provider continues to expand its new educational offerings with ongoing support and funding from the employer.

JVS Approach

At JVS, institutionalization is based on the particular needs and characteristics of each program and differs from site to site. Drawing on over twelve years' workplace education experience with more then twenty employers, JVS works closely with PET members at each site — including both business and labor partners — to arrive at an institutionalization plan tailored to that work site. This customized approach is especially important at the institutionalization stage, given the employers' need to be satisfied with a "product" he will be "buying."

L/MWEP Approach

The Labor/Management Workplace Education Program at Umass/Amherst works towards institutionalization of services on and off campus by emphasizing:

Transformation. The L/MWEP philosophy emphasizes transformation of both organizations and individuals. We do not see our work as remedial.

Labor/management activities. L/MWEP strives to involve both managers and stewards as recruiters, planners, teachers, resource people and evaluators.

Worker involvement. We strive to create opportunities for program participants to serve as teachers, tutors, researchers, conference presenters, course initiators, video producers, radio producers, public readers, worker artists or published authors.

Common ground. L/MWEP offers courses that allow workers the opportunity to focus on workplace basic skills that both union and employer identify as important.

Organizational linkages. L/MWEP endeavors to link our activities to the on-going organizational initiatives of our sponsors.

Institutionalization Tips

- Allow sufficient time for the institutionalization process to unfold.
- Make expectations clear from the outset.
- Expect the unexpected.
- Develop and foster alliances within the PET.
- Learn who the decision-makers are, and how to garner their support.
- Help stakeholders identify connections between program outcomes and employer priorities.
- Document and use program results in building the case for institutionalization.
- Think creatively with program partners to consider different institutionalization models.
- Explore collective bargaining as a means toward institutionalization.
- Continue to market your services as education provider and be aware of the market.
- Offer feedback to funders on ways to best support institutionalization at the local level.
- Run a solid program that everyone is happy with; make them *want* to continue with you as provider.

8. workplace education consortia

by
Jane Brown, BCC

What is a consortium and why do it?

A consortium—what is it?

The Latin word consortium or fellowship has developed in terms of Workplace Education Consortium to mean a fellowship of companies and unions and an educational partner which is bringing basic skills training to the collective workforce.

What companies and what unions? Companies and unions with workers in need of the basic skills expected of a high school graduate. If the consortium is to be successful, there must be belief in and commitment to workplace education from influential members of senior and middle management, frontline supervisors, workers and union members. Ideally, each person in the company and the union is committed to the idea of life-long education; realistically, there need to be members in each category who are not only committed to the concept but who are also articulate, respected and prepared to convert others.

What educators? You, as an educator (possibly attached

to a college or university), may be approached by companies who have toyed with the idea of bringing some adult basic education to their workers; you may be approached by a union; you may be the person who goes out to sell the idea to companies and/or unions. You, as an educator, must be committed to the idea of life-long learning and must have a belief in the value of basic skills acquisition to adults. Your belief should be in both the practical aspects of the acquisition (better performance on the floor, a more effective life style) and in the changes that this acquisition may bring to worker and company attitudes. A person who has mastered skills has built the confidence in himself that enables him to take charge of his life and not just accept jobs which give him little or no job satisfaction. Other employees in the company respect the commitment that participants in the programs have demonstrated.

Ideally, each person in the company and the union is committed to the idea of life-long education; realistically, there need to be members in each category who are not only committed to the concept but who are also articulate, respected and prepared to convert others.

These beliefs are, of course, necessary to any educator in the workplace education field but must be kept to the forefront in the morass of other details you will need if you are considering working with consortia. Companies forming a consortium may also be linked by: 1) geographic locations; or 2) specific industries (e.g. similar manufacturing companies or health providers).

A consortium—why do it?

Setting up a workplace education program was once most commonly organized in the following way: After being told of a number of returned orders or hearing of a misunderstanding of a work order, a member of senior management or the HR people in a company would decide that the company would be a better place if everyone on the floor spoke English or did better calculations. The HR person would approach a local educational organization: "Could you come in and set up some classes?" The educational provider's questions about short-term and long-term goals would often be met with a startled reaction. "We're manufacturers; education is your field — isn't it? Just teach 'em English." In Massachusetts this gulf between education and industry has been partially bridged. Planning and evaluation teams are a part of most workplace education programs and team work has become a reality, not just a pleasing term.

So the question, "Why set up a consortium?" can largely be answered by simply acknowledging the advantages of

bringing together several companies sharing an industry or situated in the same area which are bound by their common need for basic skills training, and binding them into a planning and problem-solving team. A combination of large and smaller companies sharing training space, building composite classes and bringing their different approaches and combined intelligence to building an effective program looks very like a formula for success.

The consortium is a happy partnership for all companies both large and small but it is of particular benefit to smaller companies. The most progressive and forward planning smaller company with a strong belief in the abilities of its workers *and* the need for basic training, may have difficulty with the logistics and costs of setting up classes. Workers in need of basic education may be spread over a very diverse range of abilities so that classes will have to be either very small (and very expensive in cost per participant) or extremely multi-level with a very diverse range of goals. Unless training is for very small groups or is one-on-one, it will probably be necessary to release a large number of workers from the floor at the same time, which is always a production difficulty — especially for small companies. The small business that joins with other companies to share a variety of classes at different times will not have these problems.

The most progressive and forward planning smaller company with a strong belief in the abilities of its workers and the need for basic training, may have difficulty with the logistics and costs of setting up classes . . . . The small business that joins with other companies to share a variety of classes at different times will not have these problems.

The Bristol Community College Experience

Bristol Community College became the educational partner in its first consortium in 1992.The Attleboro Workplace Education Collaborative (AWEC) grew from a single company's workplace education program set up by the College. Staff of one large jewelry manufacturer were pleased with the improved communication skills and confidence of workers who had taken part in their program. In view of the fact that its workforce was to double and that individual responsibilities were to increase, the company had decided that the program was to continue and offer a wider range of classes.

While the training manager was *company committed*, she was also *community minded* and she suggested to BCC staff that other companies should have access to the program. The partners applied for a JTPA 8% grant stating their goals to become a collaborative and the Plant Manager sent out invitations to the CEOs of every company in the industrial

park. These letters were followed up by a phone call from a BCC staff member.

The response was limited but there *was* a response. Reporters from the local newspaper and local TV interviewed the prospective members and the resulting publicity led to two other companies calling to find out if they might join the partnership. For the first year then, four companies shared on-site classes. Three of the four companies had the most desirable classroom space so that, after assessment and interviews, ESOL classes (open to workers from all the companies) began on two sites. GED and ABE classes (also open to workers from all the companies) began on the third.

Participants with fewer English skills and less confidence are almost always reluctant to step outside their familiar surroundings, even if the company where they will have classes is only a short distance from the company where they work.

It was then that we encountered what was to become a recurrent problem in consortia classes. Participants with fewer English skills and less confidence are almost always reluctant to step outside their familiar surroundings, even if the company where they will have classes is only a short distance from the company where they work. HR people and supervisors from the parent companies worked hard to overcome this reluctance, holding orientation sessions and escorting their workers to their new classes. Workers from the company in which classes were to be held worked hard to make their visitors feel at ease, putting up welcoming signs, greeting them with cookies and dampening down their standard security checks.

This reluctance to come to classes on different company territory was never completely overcome until the year in which one participating company invited AWEC to use its empty corporate building in the industrial park as the Attleboro Workplace Education Center. In the year that the consortium used this neutral space (which contained what were the most comfortable classrooms in our history), participants in the program felt proprietary about the Center and fears were overcome.

AWEC continued, grew in strength, acquired more partners, were awarded the 1995 Model Workplace Education Program Award — and in 1997 ceased to exist. Sadly, the original partner had new management, and in spite of its unprecedented efficiency and lightning turnaround, was to be moved to Mexico. Two companies had new management who did not place value on education, two companies who had an unchanging workforce moved onto more technical

training for workers and two companies institutionalized.

We are all most happily reminded of the days of AWEC when we recall one of the program participant's words at a prize-giving ceremony at our Center. (The building has now been sold back to the corporate world):

> I am fifty-three years old and I have always intended to get more education. I left school before I graduated. I had several jobs, went into the service and then I started in maintenance in my company. The years went on. I still had the idea in the back of my mind that one day I would do it. But I was not so sure any more. And when this chance came up, I can tell you that I was nervous. I think we all were. We were all from different companies, we were different ages, we were different. I thought what am I doing? But you know one of the best things that happened? We started to help each other. We got to be a group. We asked each other for help and we gave it. We started to care about how everyone was doing. Our teachers were great and our group was great.
>
> And I can tell you this. *My company's done this for me and if there's anytime that I can give it back to my company — in some extra time, a bit more effort — well, I'll do it.* And something else — I know guys who are holding back. They are nervous. Well I'm going to get onto them. If I can do it, they can."

Some companies entered these consortia with the knowledge that there was a need for a more skilled workforce but a belief that their workers would not respond to opportunities to improve their skills. We are finding that this is not true.

BCC

The two consortia of which the college is the educational partner at present are the Fall River Workplace Education Consortium and the New Bedford Manufacturers' Workplace Education Consortium. Both are in early stages of development; neither has as yet developed a strongly felt mission statement. Partners in both consortia are from areas where members of the workforce are traditionally highly regarded for their reliability, loyalty and the quality of their sheer hard work. The areas have also traditionally placed little emphasis on the values of education.

Some companies entered these consortia with the knowledge that there was a need for a more skilled workforce but a belief that their workers would not respond to opportuni-

ties to improve their skills. We are finding that this is not true. It is necessary for the company to clearly demonstrate its belief in the program and its intention to recognize and support workers who are taking advantage of classes. This can be done in many different ways, the most obvious of which are probably the granting of release time, the decisive attitudes of supervisors and team leaders and the company's contribution (through the Planning and Evaluation Team) to a work-based curriculum that is preparing participants for promotion. If companies — either on their own or working in consortia — are able to continue to build up this solid attitude towards training and education and its advantages, the successful future of their workplace education programs should be assured.

BCC

Recommendations and Guidelines for Other Programs

Step 1. Consider the companies with which you are working at present or with which you have been considering working. Are there several that are 'linked' in some way? (E.g. they are all in the same industrial park or they all make the same product.) What sort of training are you providing them with or what sort of training are they considering? What are their expectations and their problems with logistics? Might they benefit from forming a consortium? Would they allow program participants from other companies into their company for composite classes? Do you have a workable list with other possible companies on it?

Now, if at all possible, allow yourself six months of preliminary visiting, discussion and planning time before the consortium becomes an entity. In other words do not allow the information that Workplace Education grant money may be available to consortia if a proposal is submitted within the month be your impetus to begin suggesting the idea to companies.

Step 2. The beginning of this reaching-out period is a good time to talk the idea over with someone who may be your possible catalyst or your strong outside support person (the

Chamber of Commerce chair, the Rotary, business organizations, the mayor, or — as with our New Bedford Consortium — a director from a local newspaper).

Step 3. Visit a representative of each company separately. (Some people visit CEOs. I tend to speak to the HR people first, who then may set up a meeting with their CEOs.)

Step 4. Set up your first meeting of what will most probably be the basis of your Central Planning and Evaluation Team. (Again, the individual representatives on our Central PETs have usually been HR directors, who may not be able to make major company decisions on the spot, but who have always been both practical *and* creative, sound *and* enthusiastic, and able to empathize with workers and their needs.) It will be difficult to set up meetings that everyone can attend so be prepared to hold meetings at 7 AM when the first shift moves into action. You may find phone conferences effective, but I believe that they should be left until all members know each other well. If meetings are carefully planned and can deal with business in just under one hour, this is a decided plus. In an attempt to destroy industry belief that educators are unaware of the concept that time is money, I have taken to writing the time allowed for discussion of each topic in the margin of the agenda.

The individual representatives on our Central PETs have usually been HR directors, who may not be able to make major company decisions on the spot, but who have always been both practical and creative, sound and enthusiastic, and able to empathize with workers and their needs.

Build up your goals, plans and commitments. How will costs be shared? Will they be pro-rated or determined by company size? Might it be possible to apply for a grant? What would this involve? Would the companies institutionalize at the end of the grant period?

And most immediately, how will you organize your first six months of being a consortium? Will you begin with formation of individual company PETs? Carry out a needs analysis? Do assessments? What sort of assessments? Customized? Of whom? Everyone in the workforce? What if one of the companies has three thousand employees and another fifty two? How will you select the area to concentrate on first?

Will you have on-site programs for small groups or bigger composite classes at central sites? How will you bring the idea of needs analysis or assessments or possible training to workers? With fliers, posters, questionnaires with paychecks, educators attending team meetings for Q/A sessions, or display tables? Will all the partner companies agree to allow the

same amount of release time to students? Differing release times will bring very strong reactions from participants whose companies are less generous than others.

Step 5. When you arrive at the stage of considering goals and curriculum for classes you will need to remember that composite classes with participants from different companies reduces the chances of having a detailed work-based curriculum. There are topics that are readily shared such as safety or insurance forms, but materials from the floor may well be confidential. Still, it *is* possible to offer composite classes and small group on-site classes that are strongly work-based.

You will be aware by this stage that the setting up of a consortium is a full-time job. Make sure in your enthusiasm to take on this exciting, challenging and rewarding task that you put aside the 37.5 hours per week that are needed to coordinate a successful Workplace Education Consortium.

Tips on Setting Up a Workplace Education Consortium

- Investigate possible links between companies — geographical proximity, similar industries, common need for adult basic skills classes.
- Visit each company's representative separately first.
- Use HR representatives as your allies — they are often the most familiar with or open to educational opportunities for workers.
- Allow at least six months to visit companies, discuss and plan the consortium.
- Consortia function when both companies and education providers believe in life-long learning, as it benefits on-the-job performance *and* workers' personal lives.
- Include Consortium Coordinating in overall program costs — this is a full-time job!

appendix A

Workplace Needs Analysis Surveys – Worker Education Program

Note: *The Worker Education Program uses these questions to conduct WNA interviews with workers, supervisors and union leadership. Interviews are usually conducted one-on-one. The actual interview form leaves space between each question for the interviewer to record answers. WEP staff also use some of these questions for focus groups.*

Questions for workers

General job information

- How long have you worked here?
- What do you do in your job? (What is your typical day like?)
- What shift do you work? What days?
- Do you work in a team or alone?
- What kind of changes have you seen in your time here?

Education and training

- What sort of **reading**, **writing**, **communication** (listening and speaking) and **math** do you do in your job? *(Examples of reading and writing:* codes, labels, packages, reports, memos, forms, instructions, charting information, benefits, policies, union contract, messages, letters, work orders, meeting minutes, evaluations.) *(Examples of communication:* participating in meetings, explaining and reporting problems, understanding and using job-related vocabulary, understanding and using health and safety information, participating in trainings, giving and understanding instructions, using the telephone, understanding and using benefit and union contract information.) *(Ask for samples of written materials.)*
- Who do you communicate with at work (in writing and verbally)? What do you communicate about?
- How would you describe communication between workers and supervisors here? (Tense, friendly?)
- In what situations do you think workers (and supervisors) might need/want to improve these skills? (Ask for specific examples.) (Or: Which skills do you think workers might want to improve/work on?)
- What kind of orientation and trainings are offered for workers in your department? Have you taken any? How useful were they?
- How did you learn to do different parts of your job? (How important was the help of other workers or supervisors? Manuals?)

- What health and safety training have you taken? What health and safety information do you need for your job?
- What suggestions do you have for improving orientations and trainings here?
- What education or training programs would you like to see offered? (Or: What education or training programs could help with these skills? What kind of education opportunities are you interested in?)
- What would encourage (help) workers to get involved in these programs?
- What might make setting up/participating in an education program difficult here? (Or: What potential barriers are there to learning here?)

Union information

- How do you participate in the union?
- What are your rights as a union member? (Or: What does it mean to be a union member here?)
- Do you have a copy of your contract?
- Who is your steward?
- How does the union communicate with you?
- Are there regular union meetings here? When and where are they?
- How active are members here in the union? Who are the active members/leaders? Which departments/groups are represented? What does the leadership do?
- What might make participation in union activities difficult for some members?
- What suggestions do you have for increasing member participation?

Further opportunities

- How do people in your job get promoted here? What do you need to get promoted?
- What other jobs here would you like to have? What skills or training would you need to get that job? Are there ways to get those here?
- How would further education help you outside of work?

Notes

- Ask about best days for class, suggestions for good space for the class, etc.

Questions for union leadership

General information

- How long have you worked here? How long have you been a rep/steward here?
- What kind of changes have you seen in your time here?
- What are the major issues you face as a union rep/steward?

Union information

- What sort of orientation to the union have members here gotten?
- Do members understand their contract?
- Are there regular union meetings? How many members attend regularly?
- How active are members here in the union? Which departments or groups are active? What does the leadership do? (File grievances, set up meetings, etc.)
- What is the make-up of the membership here (languages spoken, countries of origin, etc.)?
- How are the relations and communication between these groups? Between departments?
- What sort of **reading**, **writing**, **communication** and **math** skills do members need to participate in union activities?
- How does the union communicate with its members here?
- What kind of written materials does the union put out here? What is translated?
- What might make participation in union activities difficult for some members?
- What suggestions do you have for increasing member participation? (new skills for members, more information?)

Education and training

- What sort of **reading**, **writing**, **communication** and **math** do members have to do in their jobs?
- How would you describe communication between workers and supervisors here? Between workers and the union?
- In what situations do you think workers (and supervisors) might need / want to improve these skills? (Ask for specific examples.) (Or: Which skills do you think workers might want to improve/work on?)
- What kind of orientations and trainings are offered for workers here? How useful are they?
- What health and safety trainings have members taken? What health and safety information do they need for their jobs?
- What suggestions do you have for improving orientations and trainings here?
- What education or training programs would you like to see offered? (Or: What education or training programs could help with these skills? What kinds of education opportunities are members interested in?)
- What would encourage (help) members to get involved in these programs?
- What might make setting up/participating in an education program difficult here? (Or: What are the potential barriers to learning here?)

Further opportunities

- Do workers here get promoted? What do they need to get promoted? (What skills and training do they need?)

Notes

- Ask about good times to hold class, possible classroom space, etc.

Questions for supervisors and managers

General Information

- How long have you worked here? What do you do?
- How many people do you supervise? What are their job titles?
- What is the make-up of your staff (age, sex, race, culture, languages)?
- What is the average seniority of the workers in your department?
- What kinds of changes have you seen in your time here?
- How would you describe labor/management relations here?

Education and training

- What sort of **reading, writing, communication** and **math** skills do workers in your department use in their jobs? Please give specific examples.
- Which of these areas do you see as most important?
- In what situations do you think employees here, including supervisors and managers, might need to improve these skills?
- How do you and your staff currently deal with these situations? What strategies have worked best?
- What strategies have not worked?
- Ask for copies of reading/writing materials used by workers in the department, i.e. training manuals, time sheets, accident reports. Record materials collected.
- What type of job-related training do workers receive upon being hired?
- What kind of ongoing training is offered? Who conducts this training?
- How effective is the training offered?
- What health and safety training do workers receive?
- What makes technical, safety, quality or other kinds of training hard for people?
- What suggestions do you have for making such training easier and more comfortable for people?
- Have there been any recent technological changes here? Do you foresee upcoming workplace changes that may necessitate training or education?
- What new programs that focus on reading, writing, math, computers and speaking would you like to see offered here?
- What would encourage workers to get involved in them?

Further Opportunities

- Do workers in this department get promoted? What skills and training do they need to get promoted?

Class set-up and worker participation

- Workers who participate in this program will be given 50% paid release time in order to come to class. The other 50% of class time will be on workers' own time. Most classes have two 2-hour meetings per week. Given this information, when do you think the best days/times/shifts would be to offer classes?
- Where might be a good place to hold classes?
- Would you be willing to have me observe workers in your department?

appendix B

Sample Goals, Objectives and Evaluation Methods – Jewish Vocational Service

Note: JVS developed these goals and objectives for one of its workplace/union education partnerships during wave VI of the National Workplace Literacy Program funding. Employer and union names have been withheld for reasons of confidentiality.

Goal 1: Improve employee skills as they relate to the following worker objectives:

Objective 1: Improve oral communication skills of employees at work.

Evaluation methods: This will be evaluated by 1) student self-assessments at the end of each cycle, 2) on-going teacher observation, and 3) feedback by both supervisors and union representatives provided at PET meetings and through intermittent surveys.

Measures: 1) Students measure their progress through evaluation and skill grids completed at the end of each cycle. These are done as a class activity. Results are reported in aggregate form. 2) Teacher observations are made in the form of reflections about the class's performance at the end of the cycle. 3) Supervisors and union representatives are polled intermittently through surveys which measure both qualitative and quantitative information.

Objective 2: Improve reading and writing skills of employees.

Evaluation methods: 1) student self-assessments at the end of each cycle and 2) on-going teacher observations. 3) Anecdotal evidence will also be collected and reported to PET members.
Measures: 1) student evaluation and skill grids and 2) teacher observations in the form of reflections as the end of the cycle.

Objective 3: Improve employees' work-related math skills as required or needed by the employees.

Evaluation methods: 1) student performance on worksheets, quizzes and objective tests given during and at the end of the cycle.
Measures: Results from objective tests along with anecdotal evidence provided by students, teachers, supervisors or union representatives will be used.

Goal 2: Improve employee skills as they relate to the following workplace objectives:

Objective 1: Promote active student participation in meetings and patient groups through improved skills in listening, speaking, reading and writing and through increased self confidence.

Evaluation methods: 1) intermittent surveys done by students, supervisors and union representatives; and 2) assessment tools used to evaluate the objectives listed in goal 1. 3) Anecdotal evidence will also be collected.
Measures: 1) Surveys will provide both qualitative and quantitative information.

Objective 2: Increase employee knowledge and understanding of workplace and union policies and procedures.

Evaluation methods: 1) student self-assessment at the end of each cycle, 2) ongoing teacher observations and 3) supervisor and union representative feedback through PET meetings and intermittent surveys.
Measures: 1) student evaluation and skill grids, 2) teacher observations in the form of reflections at the end of each class cycle; and 3) polling of supervisors and union representatives intermittently to measure both qualitative and quantitative information.

Objective 3: Increase the communication and decision-making skills of employees in crisis and emergency situations, and in behavioral assessments.

Evaluation methods: Same as goal 2, objective 2.
Measures: same as goal 2, objective 2.

Objective 4: Help improve knowledge and understanding of cultural differences.

Evaluation methods: 1) student self-assessment at the end of each cycle and 2) ongoing teacher observations. 3) Anecdotal evidence will also be collected.
Measures: 1) student evaluation and skill grids and 2) teacher observations in the form of reflections at the end of the cycle.

Goal 3: Improve the quality of the JVS/Worksite/Union partnership as it relates to the following objectives:

Objective 1: Involve all stakeholders in the planning, governing and evaluating of the program.

Evaluation methods: The Workplace Education Coordinator, with assistance from the Lead Teacher, will ensure that there is representation by all stakeholders at regularly scheduled PET meetings, and that these stakeholders all have the opportunity to contribute to all aspects of program planning, governing and evaluation.
Measures: 1) PET meeting minutes and 2) intermittent surveys of PET members.

Objective 2: Facilitate union member participation in the program so that it is viewed as an integral part of the union local's services.

Evaluation Methods: The Lead Teacher and Union President will ensure that all eligible employees are notified about the program during recruitment periods and when new employees are hired.
Measures: 1) Attendance is maintained and records are kept. 2) Fliers are created and distributed regularly during recruitment periods. 3) The Union President ensures that the Lead Teacher has access to the floor during recruitment periods.

Objective 3: Institutionalize the program.

Evaluation methods: During the second and third year of funding, the Coordinator of the Workplace Education program meets with [the Council] to discuss future plans for the program.
Measures: Institutionalization of the program!

The following are examples of surveys used to measure goals and objectives above. Workers and supervisors respond to each statement by circling one of these choices: very often, often, sometimes, never.

Student survey

1. Since I've been in the workplace program it is easier for me to speak up at meetings and patient groups
2. Since I've been in the workplace program it is easier for me to understand employer and union policies and procedures.
3. Since I've been in the workplace program it is easier for me to make good decisions when there is a crisis or emergency.
4. Since I've been in the workplace program it is easier to understand the culture of my coworkers.
5. When do you have a chance to use what you learn in the classes?
6. What makes it easier to speak up at meetings?

Supervisor survey

1. Since being enrolled in the program it has been easier for the employee(s) to speak up at meetings and patient groups.
2. Since being enrolled in the program it has been easier for the employee(s) to understand employer and union policies and procedures.
3. Since being enrolled in the program the employee(s) has/have found it easier to make good decisions when there is a crisis or emergency.
4. Since being enrolled in the program the employee(s) is/are better able to appreciate the cultures of their coworkers.
5. Please give an example of an improvement in the employee's skills which you believe is a result of the program.
6. Have you noticed an increase in self-confidence on the part of employees enrolled in the program? Please give an example.